POS ON CLOUD

User Manual - Retail

v1.06

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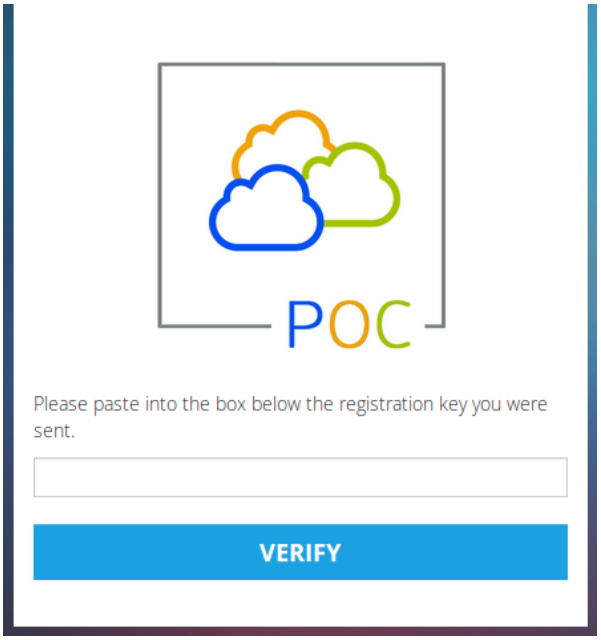
1. Installation

1.1.1 Installing POS on Cloud

Before continuing please make sure you have the following: your POS on Cloud registration key and your login PIN number. These should have been provided to you via e-mail. These installation steps are for both desktop computers and tablets.

1. Once you have your registration key and login PIN number navigate your browser to: https://food.posoncloud.com/config/register.php
   - NOTE: POS on Cloud only supports Google Chrome and Safari web browsers. Any other browser will NOT work.



2. You will now need to copy your register key EXACTLY how it appears in your e-mail into the blank field and click the **verify** button.

3. If no errors occur, then you will now see your logo on the screen and it will ask you for your PIN number. If an error does occur, then please double check you are typing in the correct registration key and try again.

4. Enter your PIN number into the field and then click **verify**.

5. You should now be taken to the Time Management page.

6. Congratulations, you have successfully installed POS on Cloud.

Frequently Asked Questions

Q: Will I have to do these installation steps for every update?
A: No, since POS on Cloud is cloud-based, you will never have to install updates. Simply refresh your browsers web page.

Q: Are there any times that I will have to reinstall POS on Cloud?
A: The only times you will have to reinstall POS on Cloud are; If you have to reinstall your OS, if you have to reinstall your web browser, or if you delete your web browser's cache. In order to do these reinstalls you must inform us first in order to reactivate you registration key.

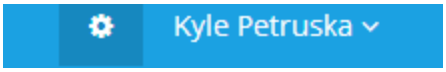
2. Configuration

2.1 Configuring Your Store

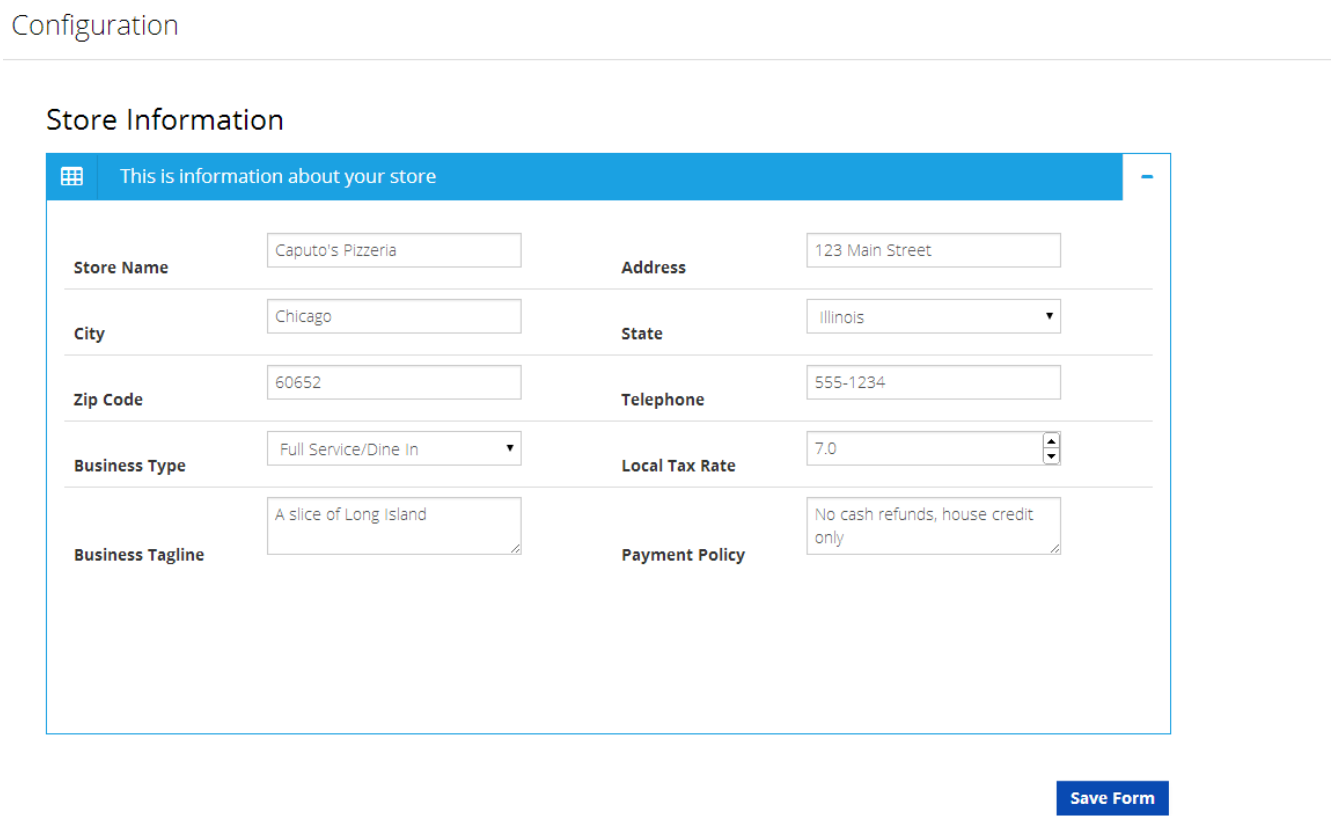
The store configuration allows you to change a host of settings for your business. These settings include: Store Name, Address, City, State, Zip Code, Telephone, Business Type, Local Tax Rate, Business Tagline, and Payment Policy.

2.1.1 Editing your store configuration

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Store** button in the left-hand side of the screen.



3. In the store information page simply edit any setting you wish to change.

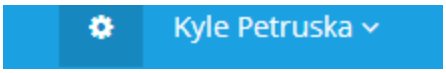
4. When done editing, scroll to the bottom on the page and click the **Save Form** button.

2.2 Users

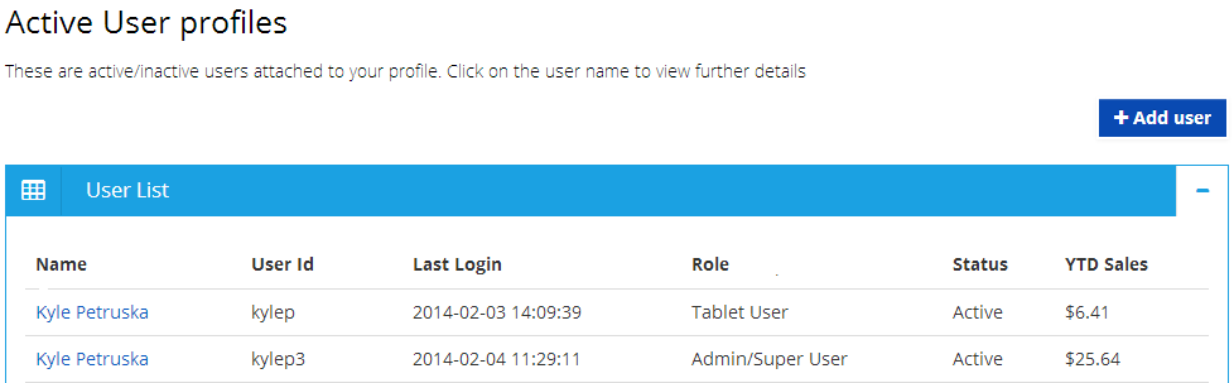
Users are the employees of your business. Each employee will have their own unique user profile and PIN number. This will be how your employees logs into the system.

2.2.1 Adding a User

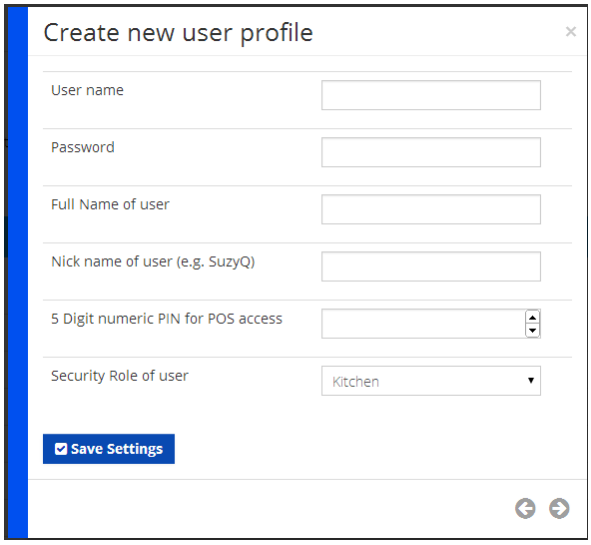
1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.



3. Click the **Add User** button. This should bring up the Create new user profile menu.

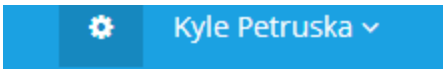


4. Fill out the information as needed.
    - NOTE: User name and PIN number must be unique. Password must be at least six (6) characters long.

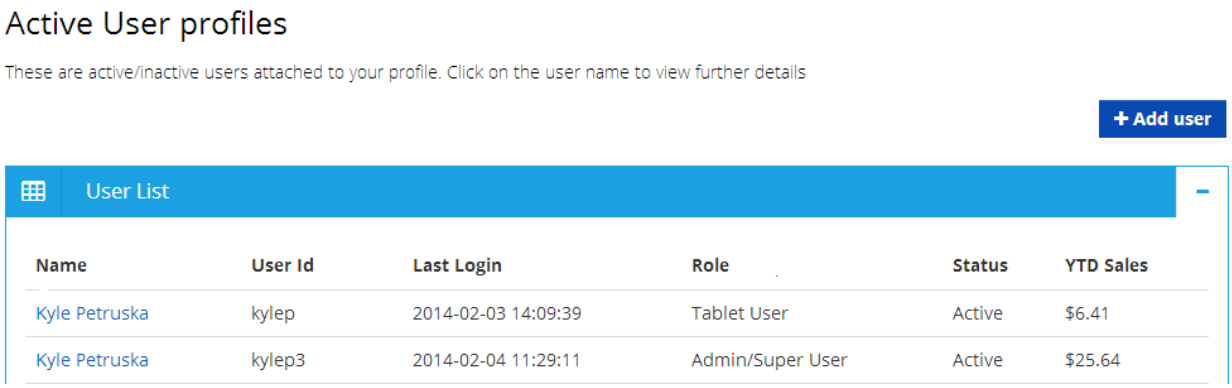
5. When you have filled out all of the information click **Save Settings**. Your new user should appear in the list.

2.2.2 Editing a User

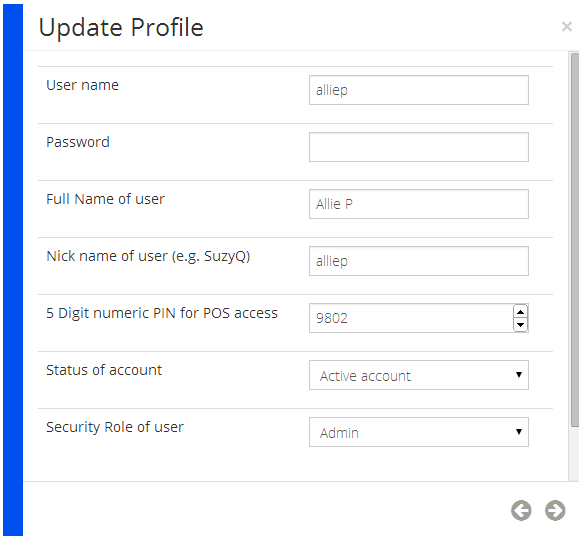
1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.



3. Click the Name of the user you wish to edit. The Update Profile menu should appear.

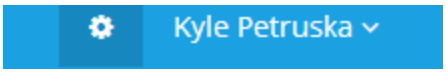


4. Once you are done editing the user profile click **Save**.

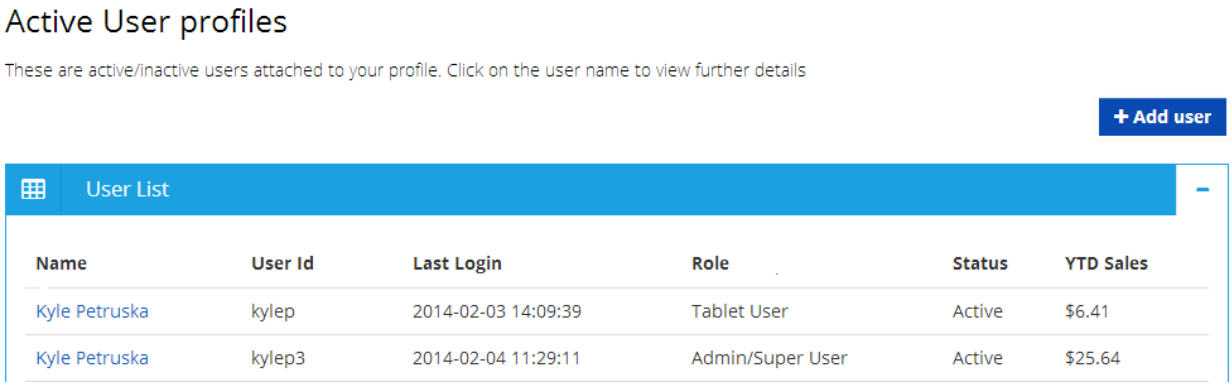
5. The profile is now updated.

2.2.3 Deleting a User

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

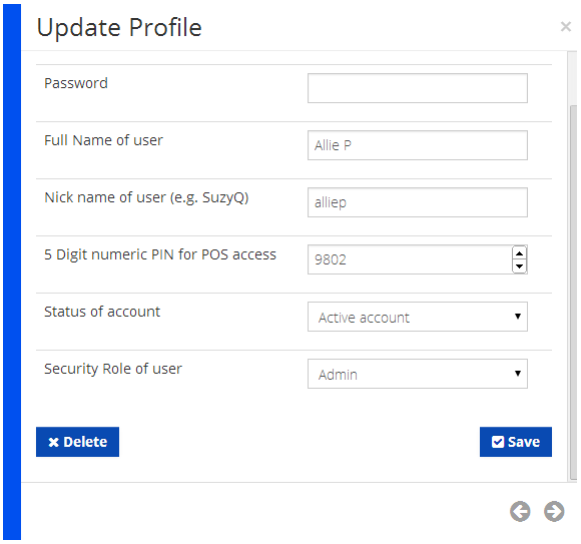


2. Once at the configuration page click the **Users** button in the left-hand side of the screen. This will take you to the list of Active User Profiles.



3. Click the Name of the user you wish to edit. The Update Profile menu should appear.

4. Scroll down to the bottom of the menu and click **Delete**.



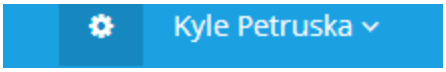
5. It will ask you to confirm the deletion. Click **Delete**. The user should be removed from the Active Profile list.

2.3 Settings

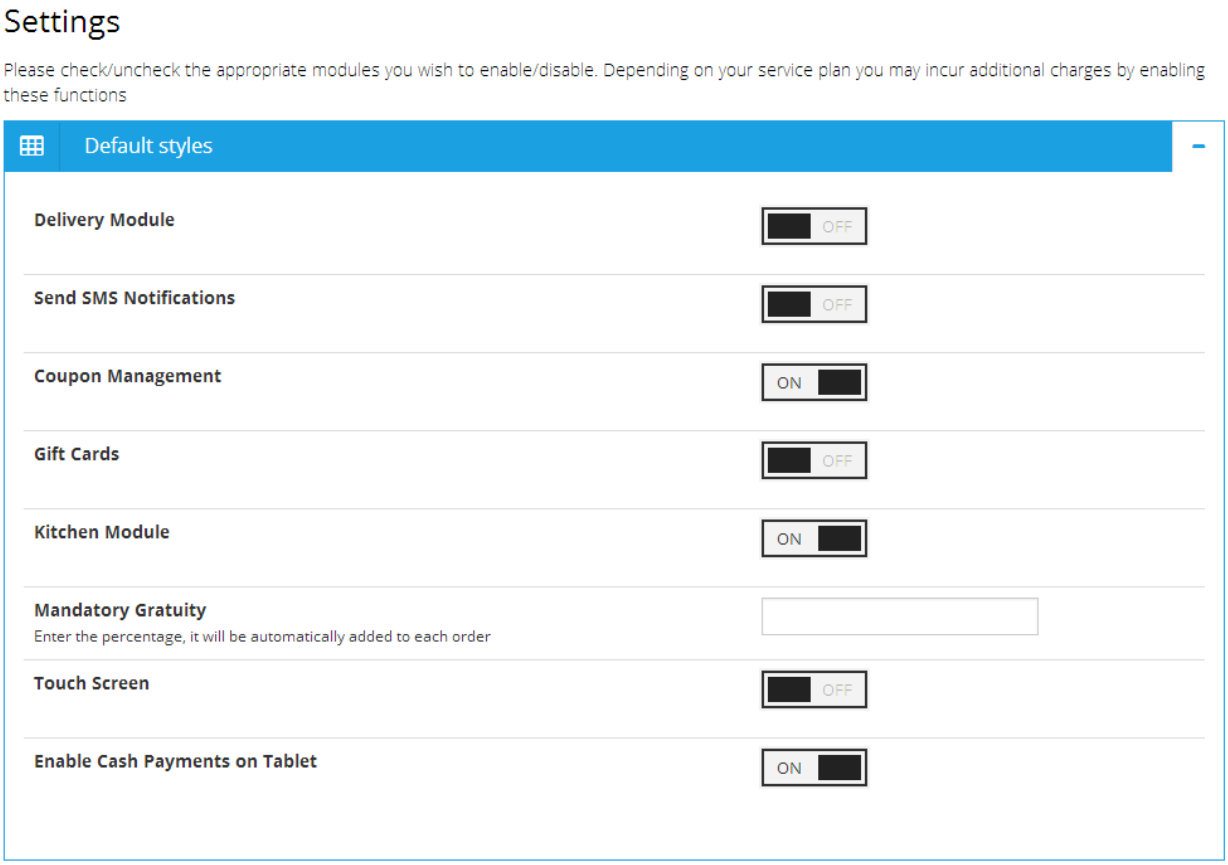
Settings allow you to enable/disable certain modules for your store.

2.3.1 Enabling/Disabling a Setting

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Settings** button in the left-hand side of the screen. This will take you to the Settings menu.

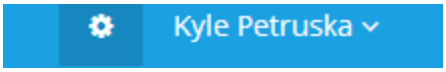


3. Find which setting you wish to enable/disable then click the **black square** in order to turn that feature on or off. This is saved automatically.

2.4 Printers

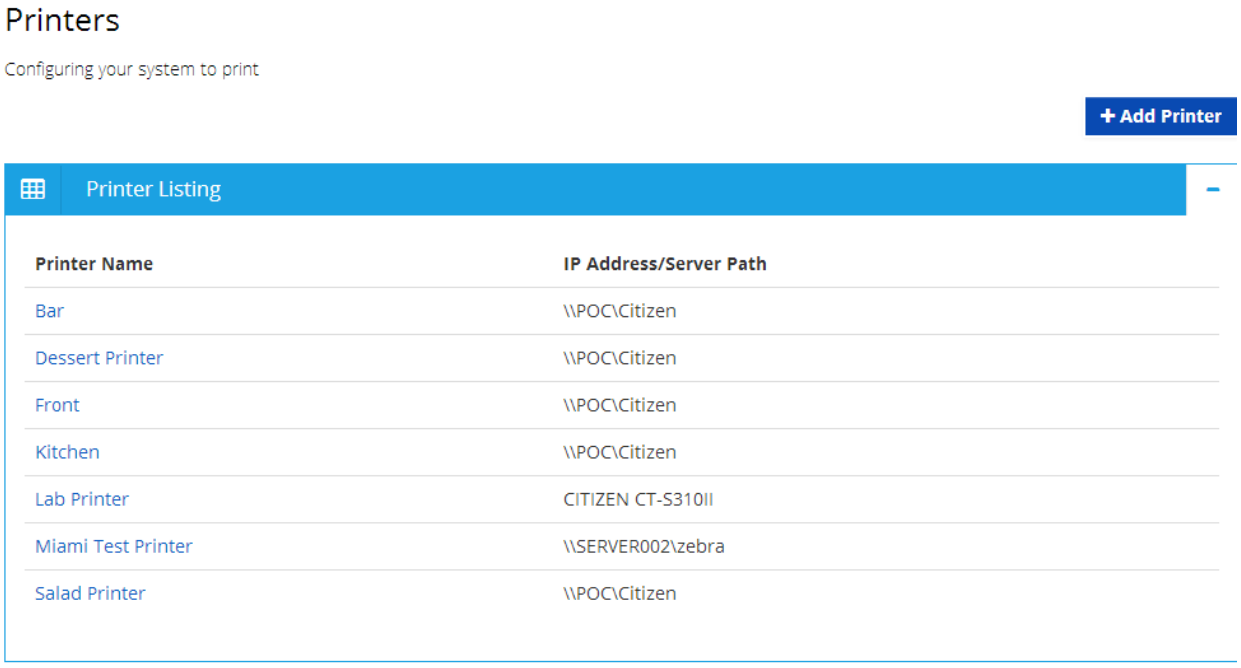
2.4.1 Adding a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

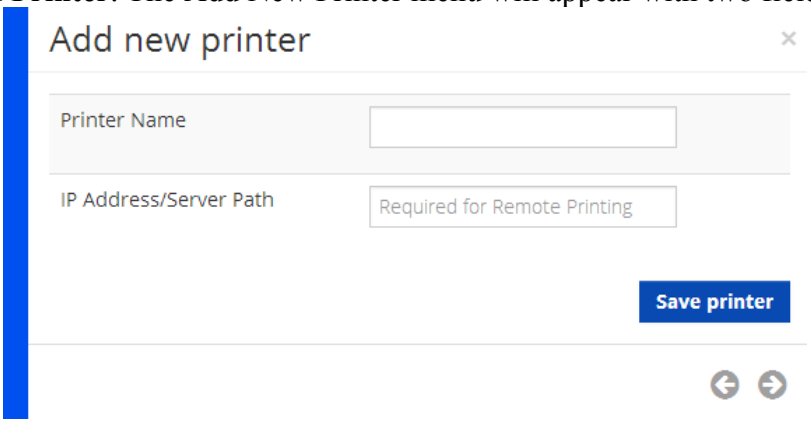


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer List**. A list of all configured printers will appear.



4. Click **Add Printer**. The Add New Printer menu will appear with two fields.



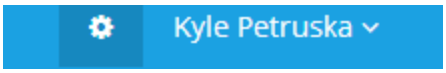
5. In the field that says Printer Name you can name the printer anything to make it easily recognizable, such as “Kitchen.”

6. In the field that say IP Address/Server Path you give either the IP address of the printer on your network, the server path of your printer if it is shared on the network, or if it is a locally connected printer simply the exact name of the printer as it appears in your computer's printer list.

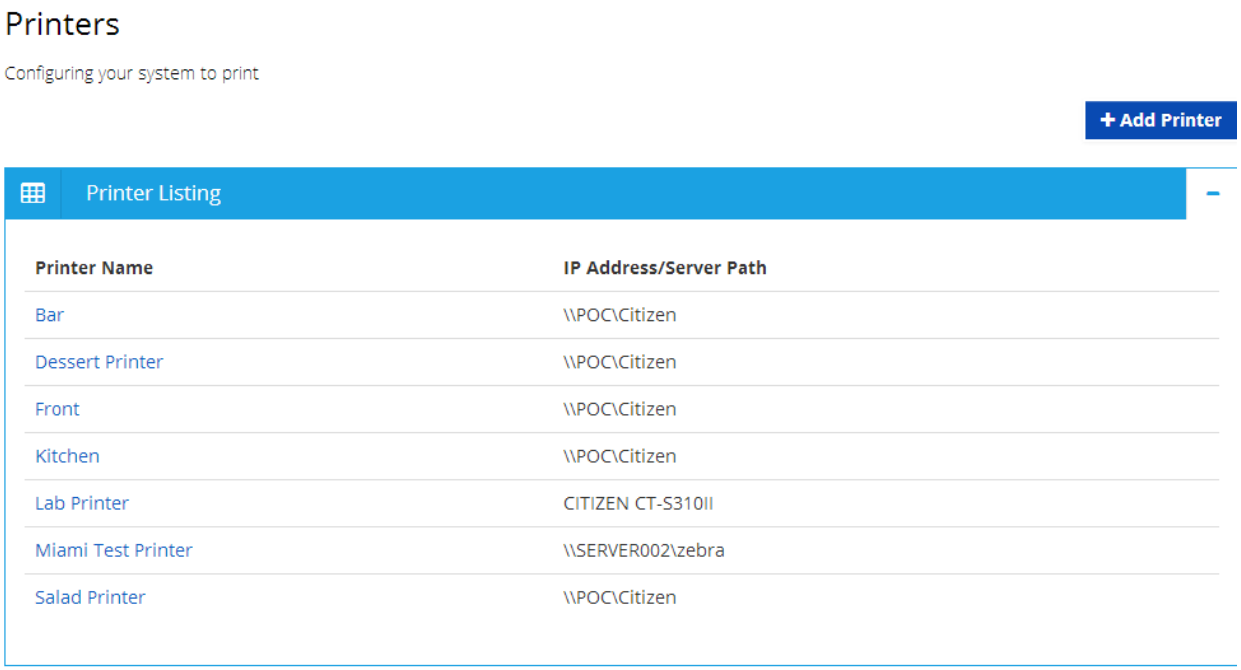
7. Once you are done, click **Save printer**. The new printer should now appear in the list.
   - NOTE: The system does not make sure the printer you entered is connected. Please make sure you have correctly installed the printer before adding it to the list. To double check to see if the printer is installed click the printer name, then click **Test Printer**.

2.4.2 Editing a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

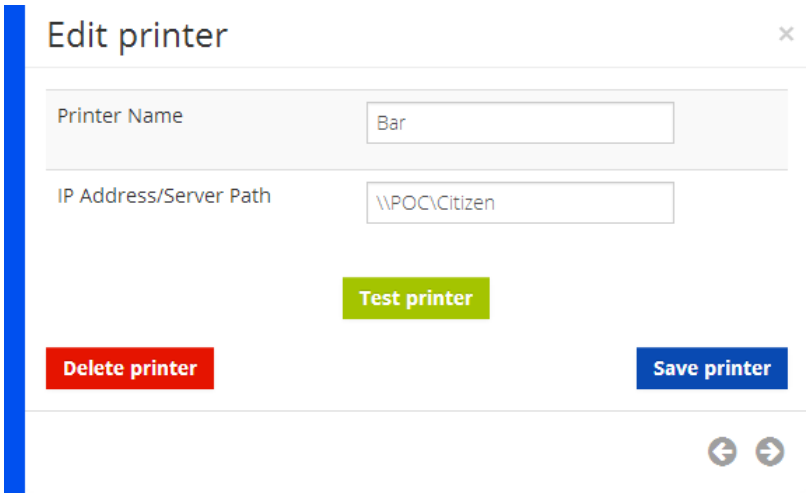


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.



3. Click **Printer List**. A list of all configured printers will appear.

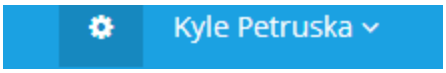
4. Click the Printer Name of the printer you wish to edit. The Edit printer menu should appear.



5. Edit the field needed then click **Save printer**.

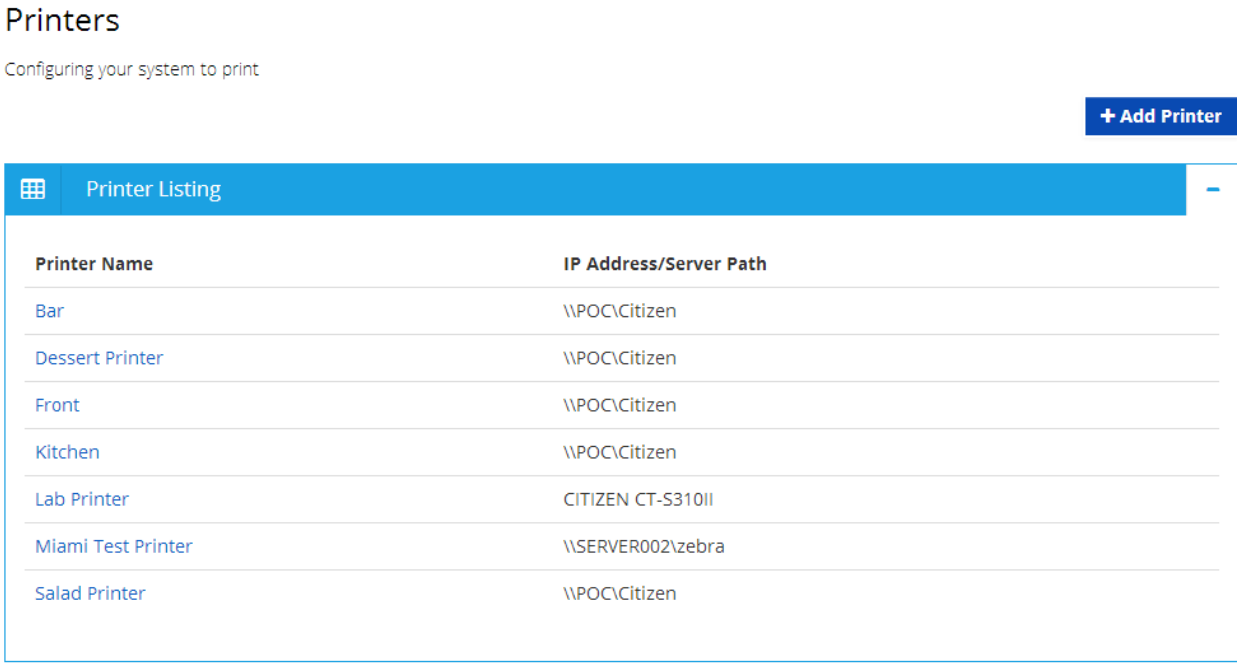
2.4.3 Deleting a Printer

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

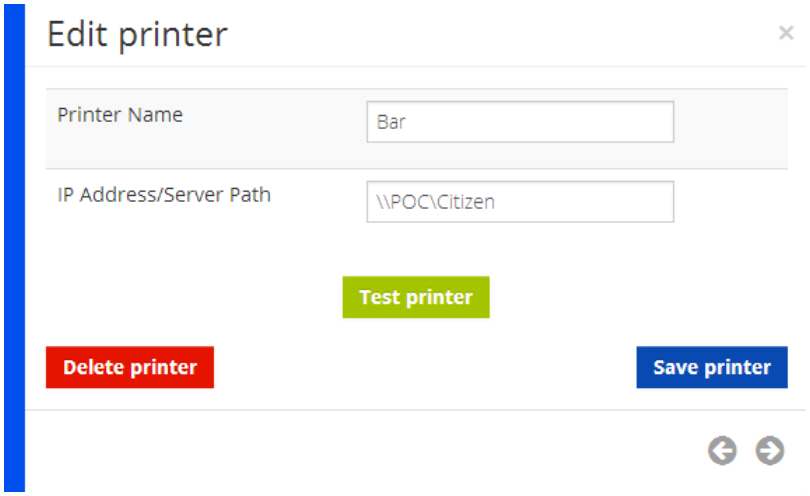


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer List**. A list of all configured printers will appear.



4. Click the Printer Name of the printer you wish to delete. The Edit printer menu should appear.



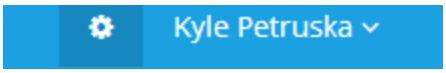
5. Click **Delete printer** in the bottom left corner. The printer is now deleted from the list.

2.5 Printer Mapping

This utility is used to map a specific category of product to a specific printer. If mapping is not set up properly then no receipts will print. Every category MUST have a printer mapped to it in order for product receipts from that category to print.

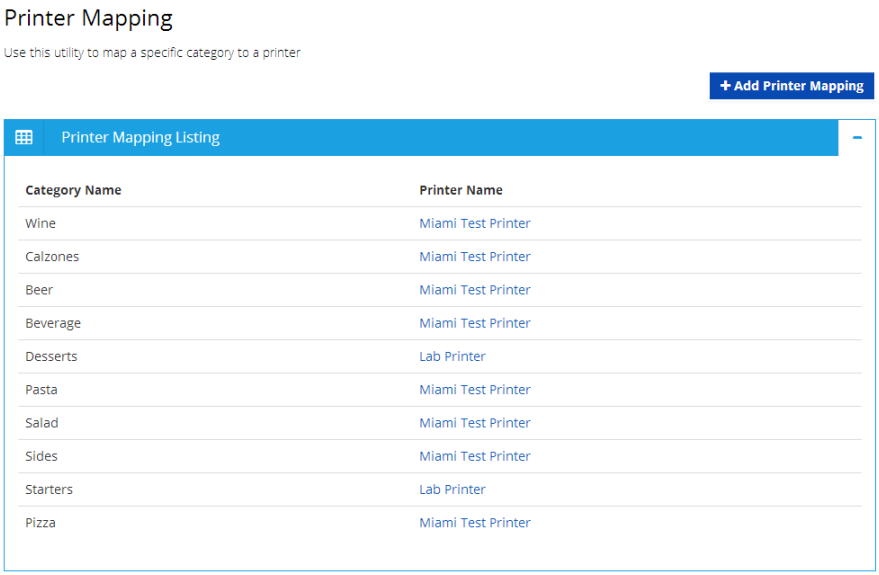
2.5.1 Adding a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

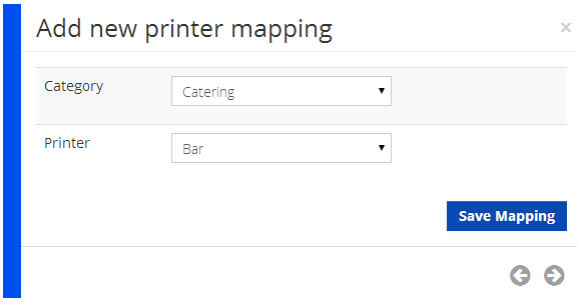


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.



4. Click **Add Printer Mapping**. The Add new printer mapping menu should appear.

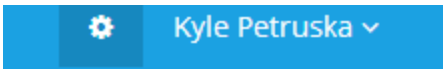


5. Simply selection which category goes to which printer from the drop down menus.

6. Click **Save Mapping**. The new printer map is now added to the list.

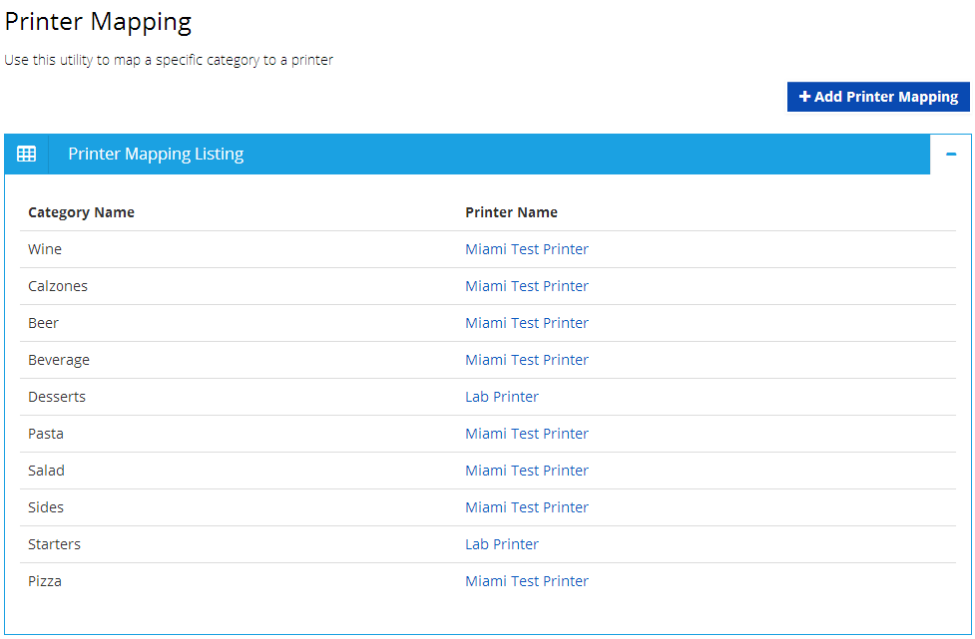
2.5.2 Editing a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

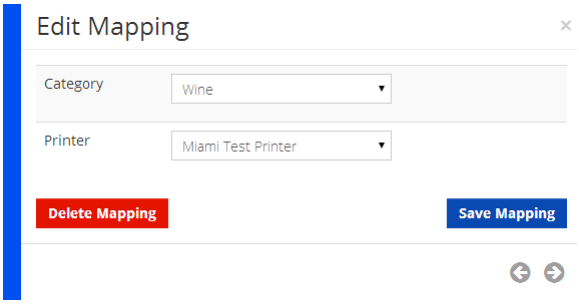


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.



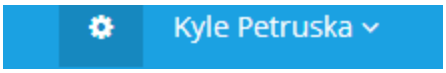
4. Click the **Printer Name** alongside the Category you wish to edit. The Edit Mapping menu will appear.



5. Change the settings then click **Save Mapping**.

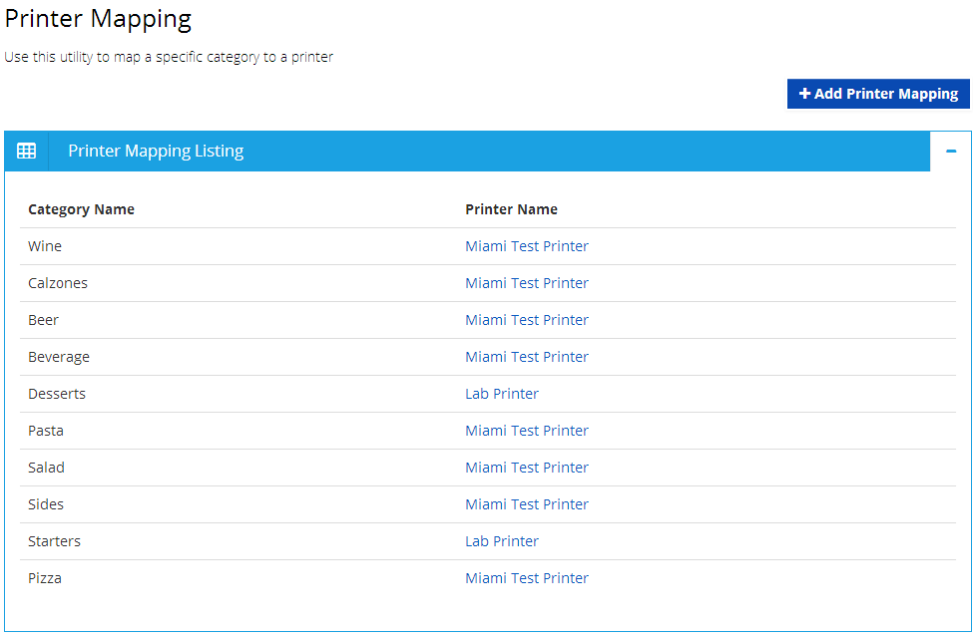
2.5.3 Delete a Printer Map

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.

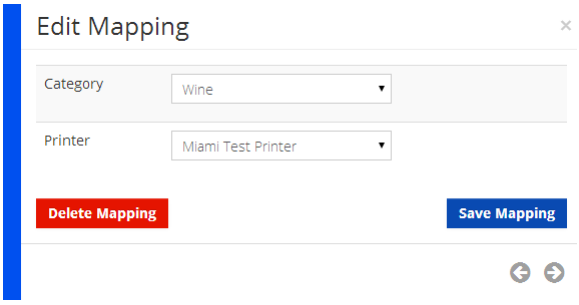


2. Once at the configuration page click the **Printers** button in the left-hand side of the screen. A drop down menu will appear below.

3. Click **Printer Mapping**. A list of all the current printer mapping will appear.



4. Click the **Printer Name** alongside the Category you wish to delete. The Edit Mapping menu will appear.



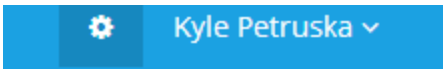
5. Click **Delete Mapping**. The mapping is now removed from the list.

2.6 Gateways

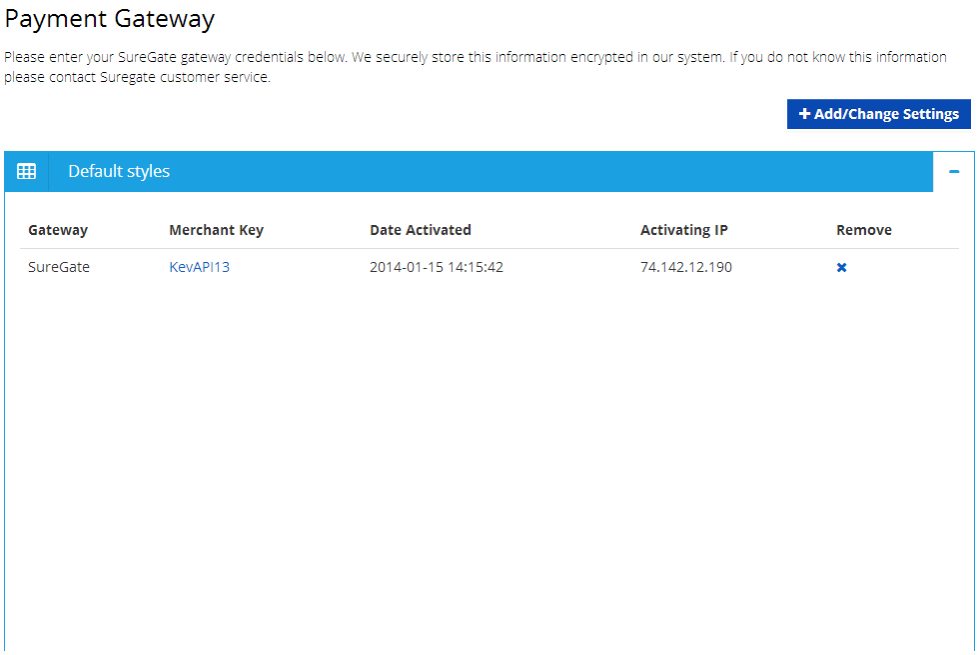
This is where you will enter your SureGate gateway credentials. We securely store this information encrypted in our system. If you do not know your SureGate information then please contact SureGate customer service.

2.6.1 Adding a Gateway

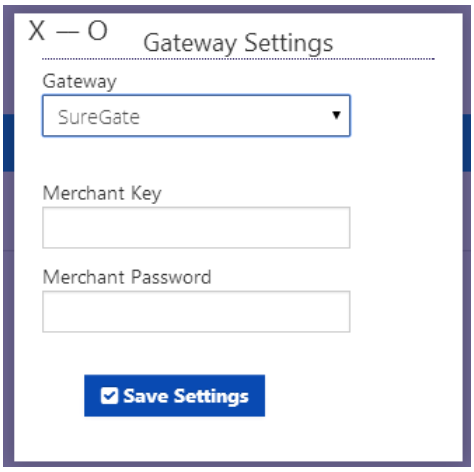
1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.



3. Click **Add/Change Settings**. The Gateway Settings Menu will appear.



4. Select which Gateway you use from the drop down menu. Currently we only support SureGate. Once you have selected two new fields will appear.

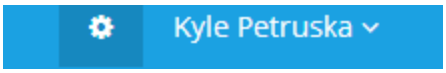
5. The first field is your Merchant Key. Type in the key given to you by SureGate.

6. The second field is your Merchant Password. Type in the password given to you by SureGate.

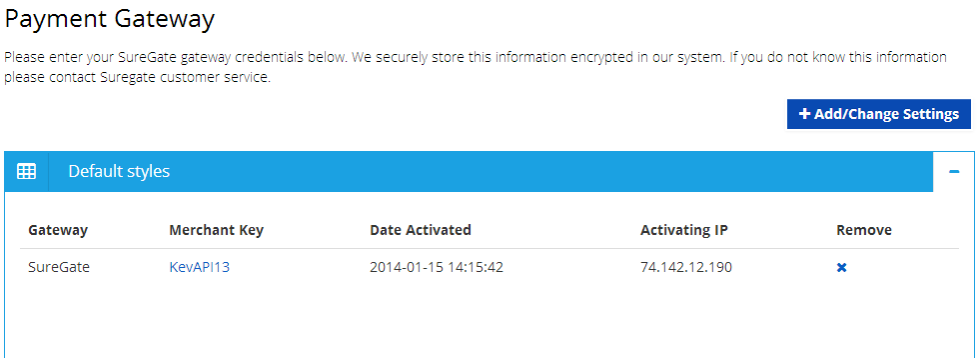
7. Click **Save Settings**.

2.6.2 Editing a Gateway

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.



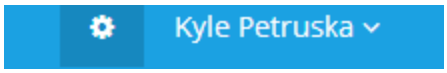
3. Click **Add/Change Settings**. The Gateway Settings Menu will appear.

4. Change the desired field(s).

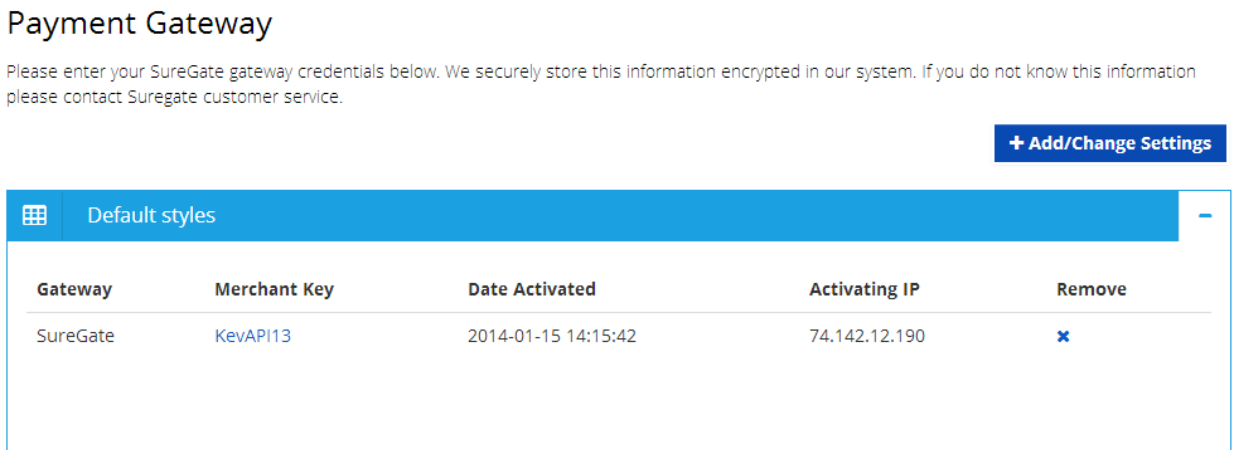
5. Click **Save Settings**.

2.6.3 Deleting a Gateway

1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Gateways** button in the left-hand side of the screen. A list of all your current Gateway information will appear.



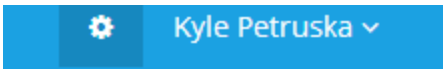
3. Find the row with Gateway you wish to delete. Go to the Remove column of the list. Click the blue **X**.

2.7 Register Keys

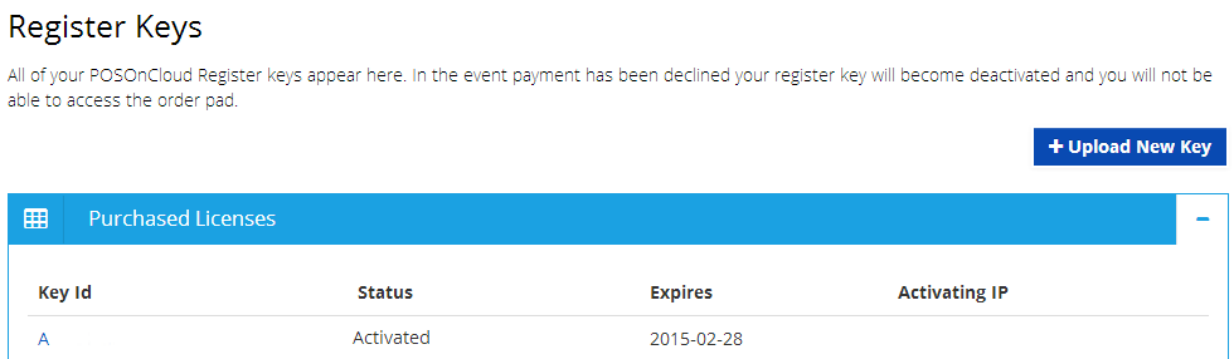
This is where all of your POS on Cloud Register keys appear. In the event payment has been declined you register key will become deactivated and you will not be able to access the order pad.

2.7.1 Adding a Register Key

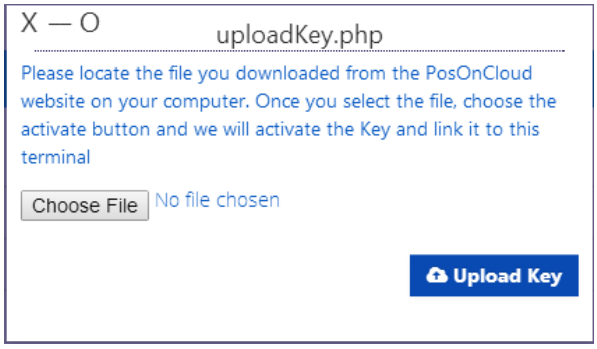
1. Click the **Cogwheel** button next to your name in the top right corner of your screen. This will take you to the configuration page.



2. Once at the configuration page click the **Register Key** button in the left-hand side of the screen. A list of all your current register keys will appear.


Register Keys
All of your POSOnCloud Register keys appear here. In the event payment has been declined your register key will become deactivated and you will not be able to access the order pad.
+ Upload New Key
Purchased Licenses
Key Id
Status
Expires
Activating IP
A
Activated
2015-02-28

3. Click **Upload New Key**. The Upload Key menu will appear.


X — O
uploadKey.php
Please locate the file you downloaded from the PosOnCloud website on your computer. Once you select the file, choose the activate button and we will activate the Key and link it to this terminal
Choose File
No file chosen
Upload Key

4. Click **Choose File** and navigate to the key file.

5. Once the file is selected click **Upload Key**.

3. Products

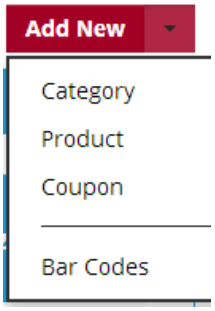
3.1 Your Products

Adding, editing, customizing, and deleting your products has never been so easy. POS on Cloud makes this easy with our product management system.

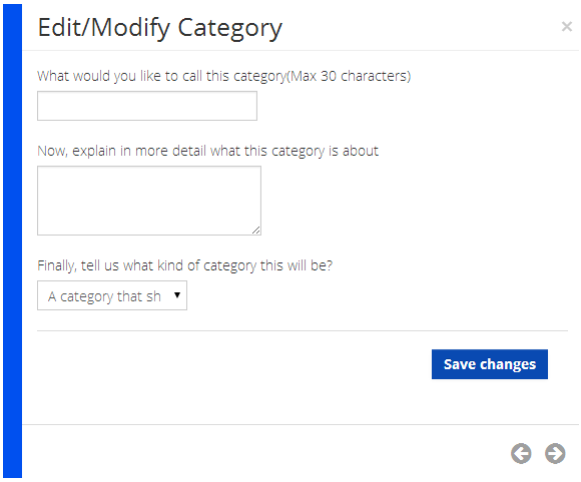
3.1.1 Adding A New Product Category

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Category**. The Edit/Modify Category menu will appear with three (3) fields.


Edit/Modify Category
What would you like to call this category(Max 30 characters)
Now, explain in more detail what this category is about
Finally, tell us what kind of category this will be?
A category that sh
Save changes

4. The first field is the name of your category. This only supports up to thirty (30) characters.

5. The second field is the description of your category.

6. The third is the type of category. **“A category that shows products I wish to sell”** must be selected to create a new category.

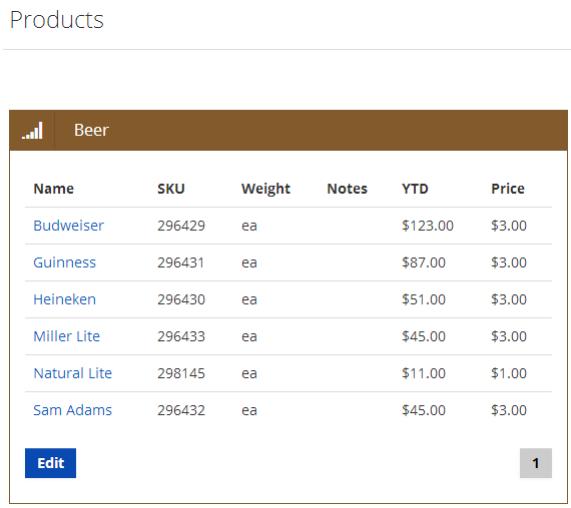
7. Click **Save Changes**.
   - NOTE: Giving a category a custom color theme can be found in Editing A Product Category.

3.1.2 Editing A Product Category

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category you wish to edit.

3. Click **Edit** at the bottom. The Modify Category menu will appear.



4. Edit the category to your needs. You can even change the color theme from this menu.

5. Click **Save changes**.

3.1.3 Deleting A Product Category

- NOTE: In order to delete a category there must be no products in that category. Please reference Deleting A Product or Modifying A Product.

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category you wish to deleted.

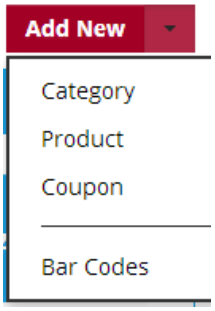
3. Click **delete category**.

4. A confirmation will appear asking if you want to delete the category. Click **OK**.

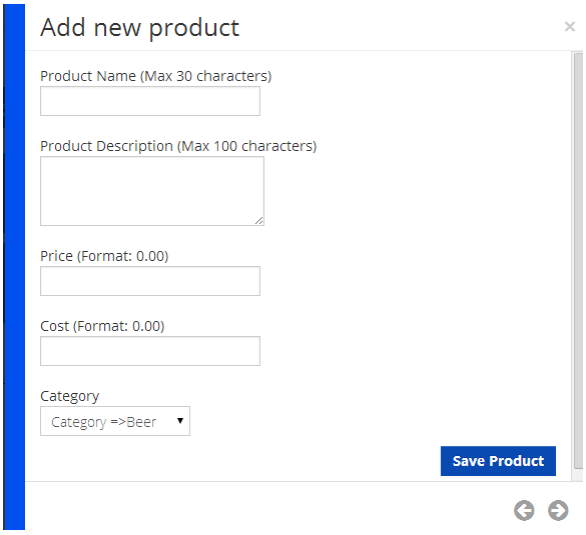
3.1.4 Adding A New Product

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Product**. The Add New Product menu will appear.



4. The first field is the name of the product you are selling. This supports up to thirty (30) characters.

5. The second field is the description of the product you are selling.

6. The third field is how much you are charging for that product.

7. The fourth field is how much the item cost you.

8. The sixth field is the category this product goes into. Simply use the dropdown menu to select one of your already created categories.

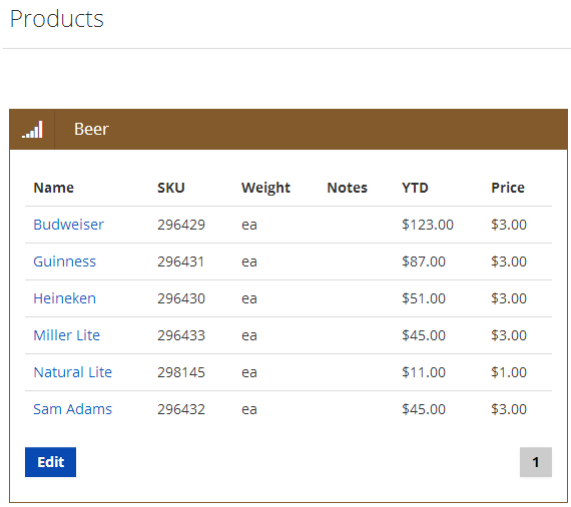
9. Click **Save Changes**.

3.1.5 Editing A Product

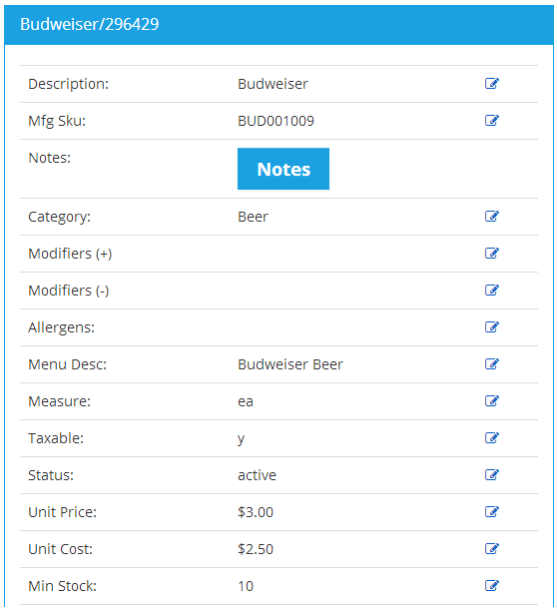
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category the product is in. A list of all the items in this category will appear.

3. Click the product you wish to edit. The product and all of its fields will appear to the right of the list.



4. Click the **Pen and Paper** icon next to the field you wish to change.



5. Edit the field. These fields range from Product name, Category, Modifiers, Allergens, Description, Taxable, Status, Price, Cost, Tax Rate, and more.

6. When done simply click out of the field you edited. Changes are saved automatically.

7. Repeat steps 4 through 6 as needed.

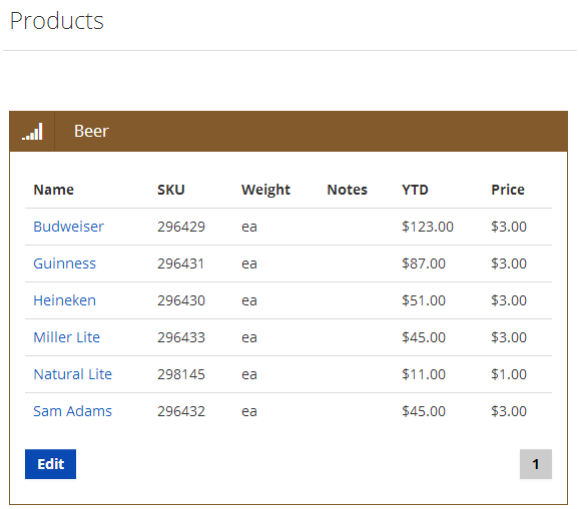
3.1.6 Deleting A Product

- NOTE: Only items with NO sales are able to be deleted. If you wish to set a product to no longer appear in the order pad please refer to Setting A Product Inactive.

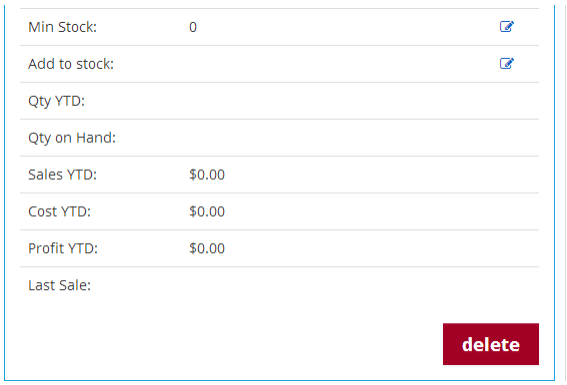
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category the product is in. A list of all the items in this category will appear.

3. Click the product you wish to delete. The product and all of its fields will appear to the right of the list.



4. Click **delete** in the bottom left corner.



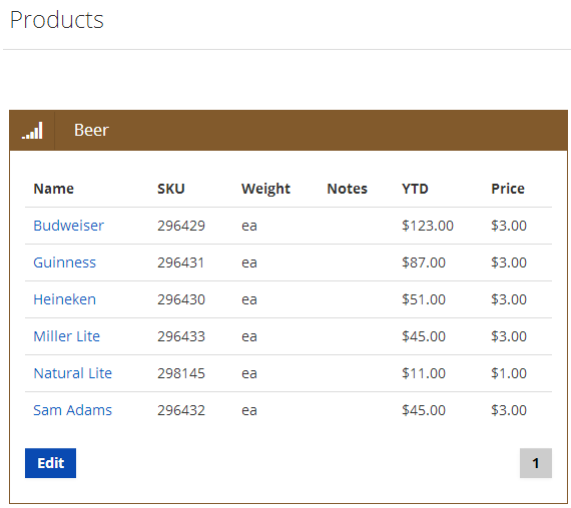
5. A confirmation will appear asking if you really wish to delete this product. Click **OK**.

3.1.7 Adding/Editing Product Notes

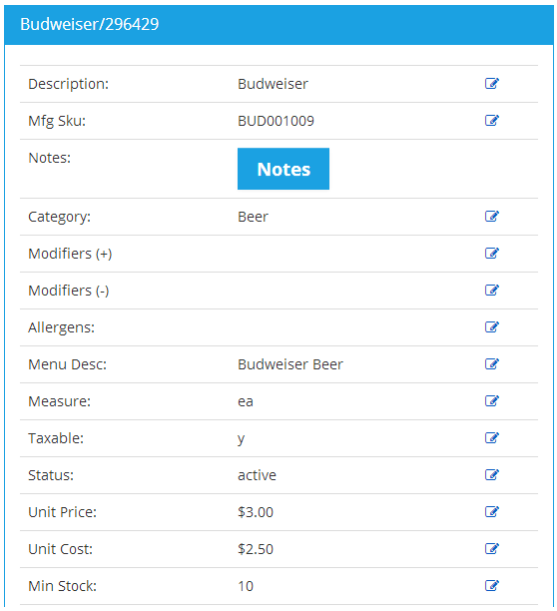
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category the product is in. A list of all the items in this category will appear.

3. Click the product you wish to edit the notes of. The product and all of its fields will appear to the right of the list.



4. Click the **Notes** button.



5. Click **Add note** to add a new line, or click **an existing line** to edit it. Repeat as needed.

6. Click **Save notes**.

3.1.8 Adding/Editing A Product SKU

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category the product is in. A list of all the items in this category will appear.

3. Click the product you wish to add a SKU to. The product and all of its fields will appear to the right of the list.

4. Click the **Pen and Paper** icon next to the Mfg Sku field.

5. Enter whatever you wish the SKU to be.

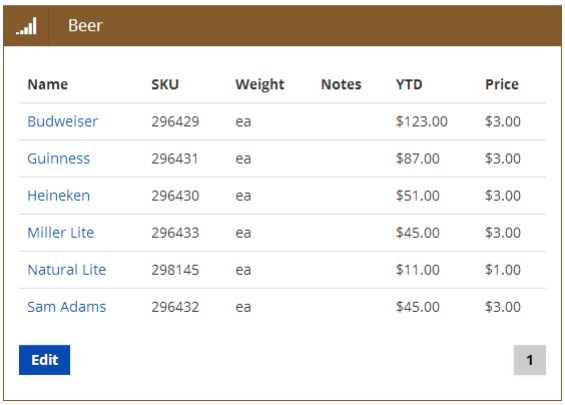
6. Once you are done entering the SKU, click out of the form. Changes will be saved automatically.

3.1.9 Changing If a Product is Taxable.

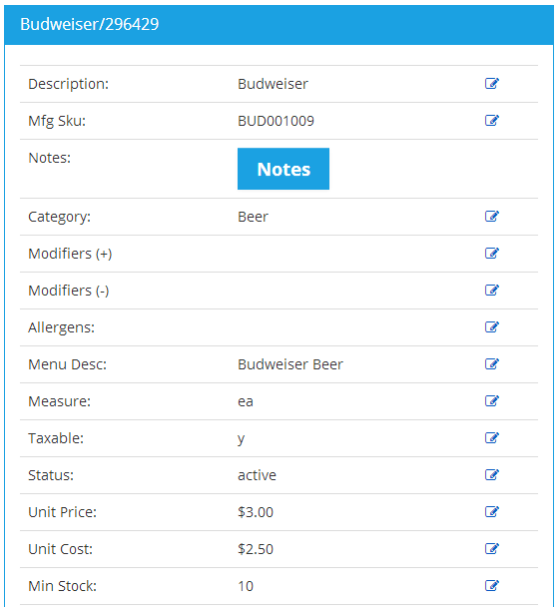
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the category the product is in. A list of all the items in this category will appear.

3. Click the product you wish to add set taxable or not. The product and all of its fields will appear to the right of the list.



4. Click the **Pen and Paper** icon next to the Taxable field.



5. Click either **Taxable** OR **Non-taxable**. Changes will be saved automatically.

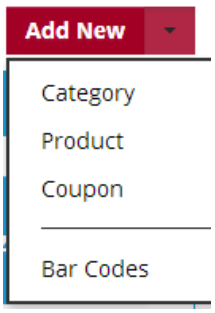
3.2 Coupons

Coupons can be set to automatically discount customers for buy a certain number of a certain product during a specific time frame.

3.2.1 Adding A New Coupon

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Coupon**. The Add new coupon menu will appear.
TODO

4. The first field is a coupon code for the new coupon. This has a ten (10) character limit.

5. The second field is the description of the coupon. This has a thirty (30) character limit.

6. The third field is how many units of the product must be purchased before the coupon is applied.

7. The fourth field is how much the discount takes off (ex: 1.00).

8. The fifth and sixth fields specify which dates the coupon runs through. If left blank, the default time is set to one (1) month.

9. For the seventh field use the dropdown menu to select which product or modifier this coupon applies to.

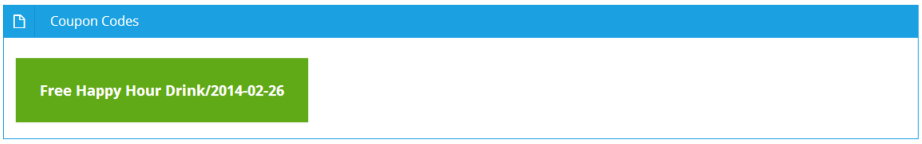
10. Click **Save changes**.

3.2.2 Editing A Coupon

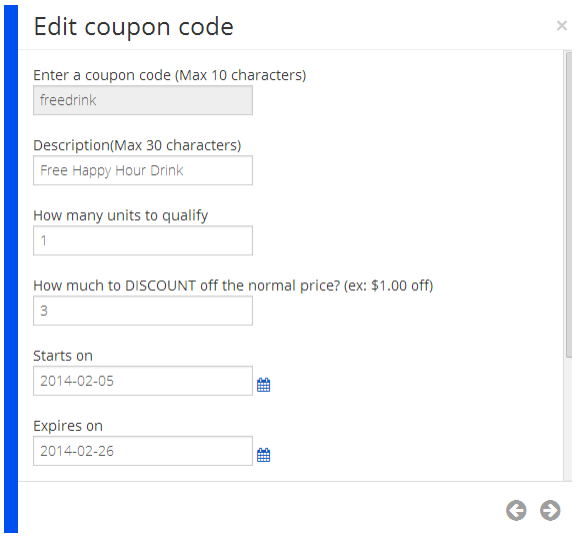
1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2.

Click **Coupons**. The Coupon Codes menu will appear.

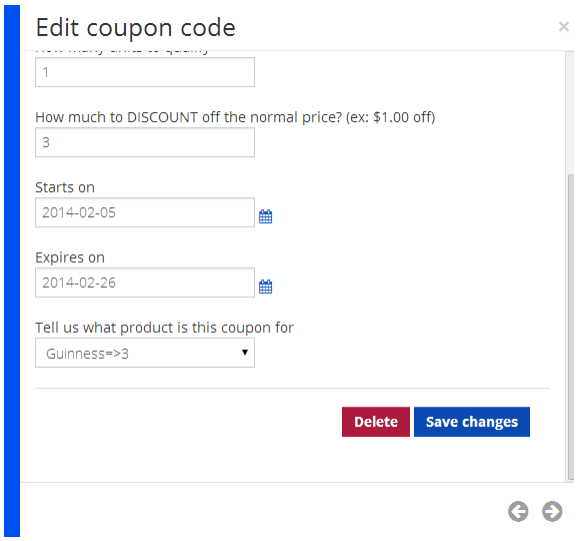


3. Click the coupon you wish to edit. The edit coupon code menu will appear.



4. Edit the fields as needed.

5. Click **Save changes**.



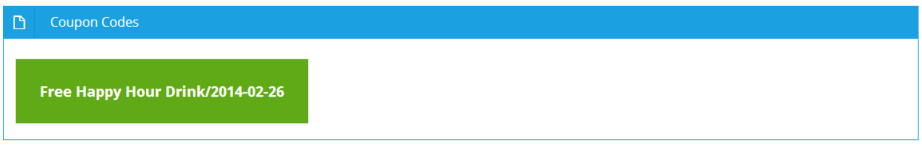
3.2.3 Deleting A Coupon

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

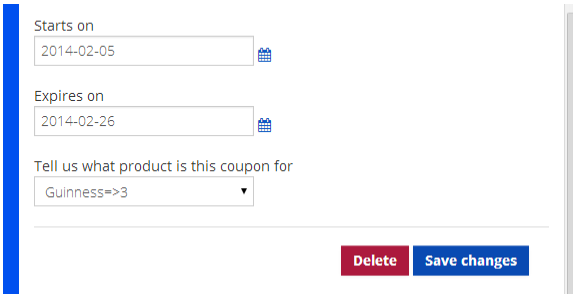
2.

Click **Coupons**.

3. Click the coupon you wish to delete. The edit coupon code menu will appear.



4. Click **delete**.



3.3 Bar Codes

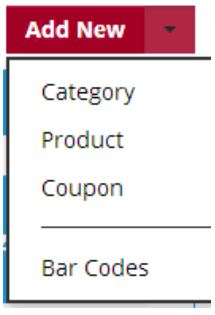
With POS on Cloud you can create and print your own bar codes through our system. It is simple and easy to do with no hassle at all.

3.3.1 Printing Bar Codes for Products

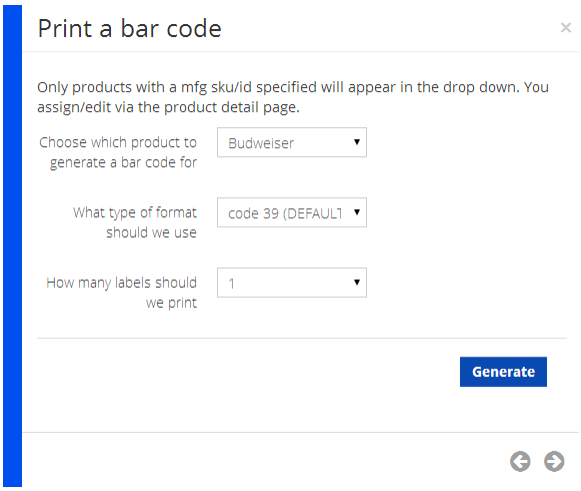
- NOTE: Only products with a SKU will appear in the Print bar code menu. Please refer to **Adding/Editing A Product SKU** for details on this.

1. Click **Products** tab. A list of your current product categories will appear along with the number of items in each category.

2. Click the **black downward arrow** next to Add New. A dropdown menu will appear.



3. Click **Bar Code**. The Print bar code menu will appear.

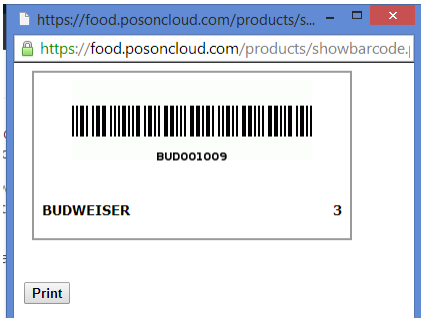

Print a bar code
Only products with a mfg sku/id specified will appear in the drop down. You assign/edit via the product detail page.
Choose which product to generate a bar code for
Budweiser
What type of format should we use
code 39 (DEFAULT
How many labels should we print
1
Generate

4. The first field is which product bar code you wish to print. Select one via the dropdown menu.

5. The second field is the bar code format. Select one via the dropdown menu. The default is code 39.

6. The third field is how many labels you want to print.

7. Click **Generate**. A new window should appear with the bar codes.



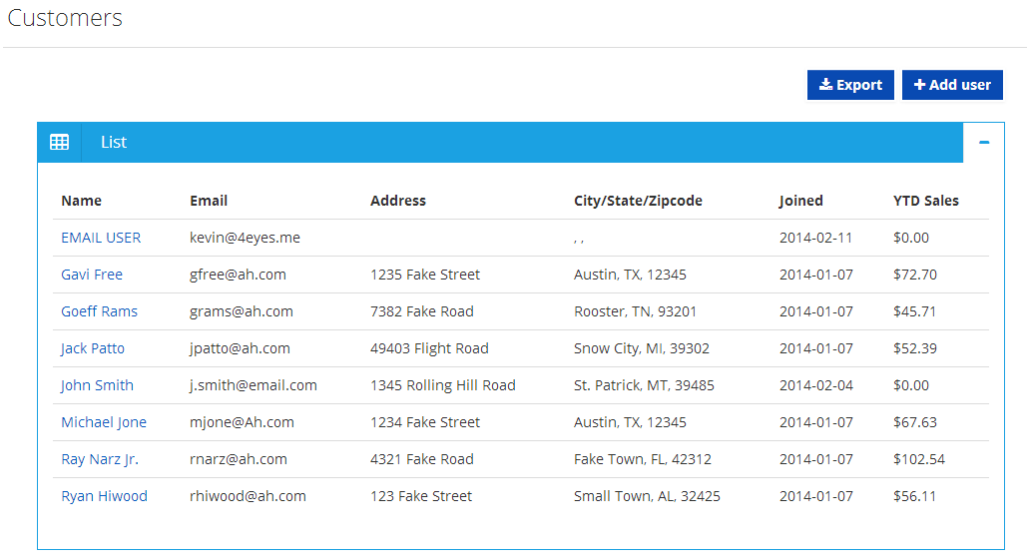
8. Scroll to the bottom of the window. Click **Print**.

9. Make sure all your printer settings are correct. Click **Print**.

4. Customers

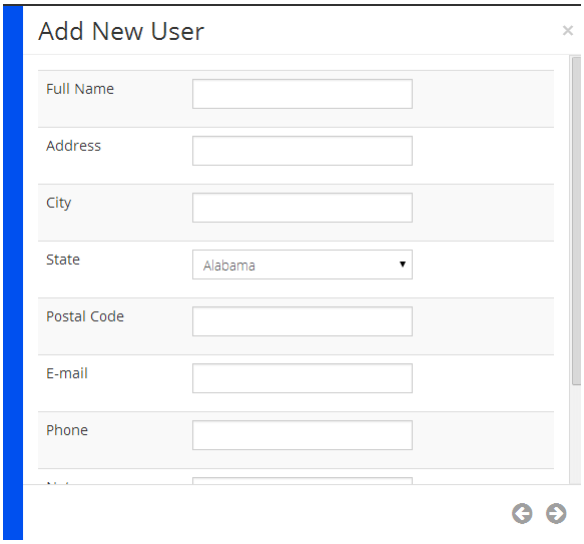
4.1.1 Adding A New Customer

1. Click **Customers** tab. A list of your current customers will appear.



Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me		, ,	2014-02-11	$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	$67.63
Ray Narz Jr.	rnarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	$102.54
Ryan Hiwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	$56.11

2. Click **Add user**. The Add New User menu will appear.

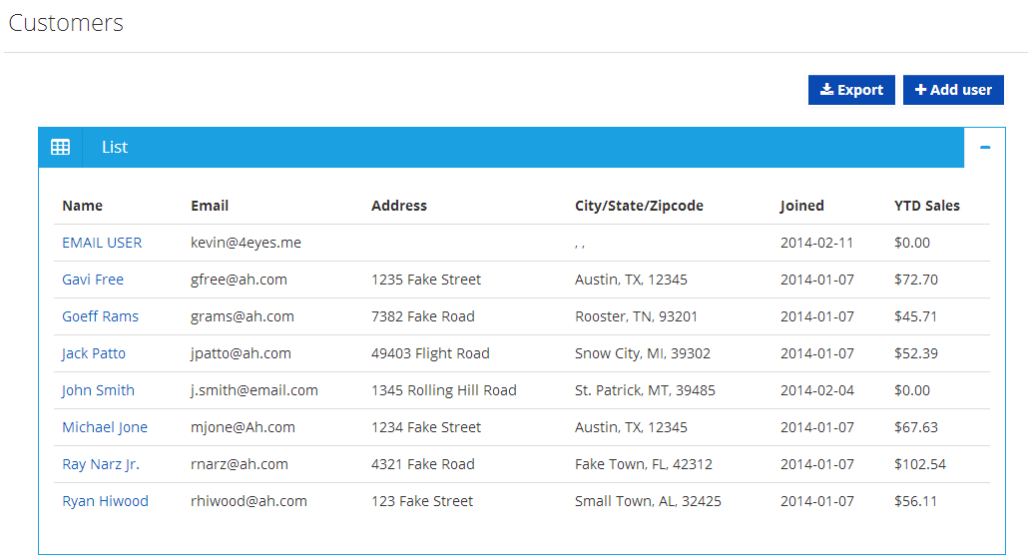


3. Fill out fields as needed. The notes and phone fields are optional.

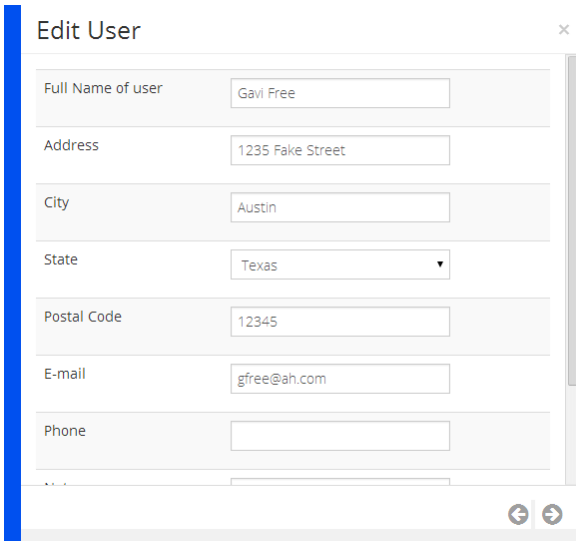
4. Click **Save Settings**.

4.1.2 Editing A Customer

1. Click **Customers** tab. A list of your current customers will appear.



2. Click the **Name** of the customer you wish to edit. The Edit User menu will appear.

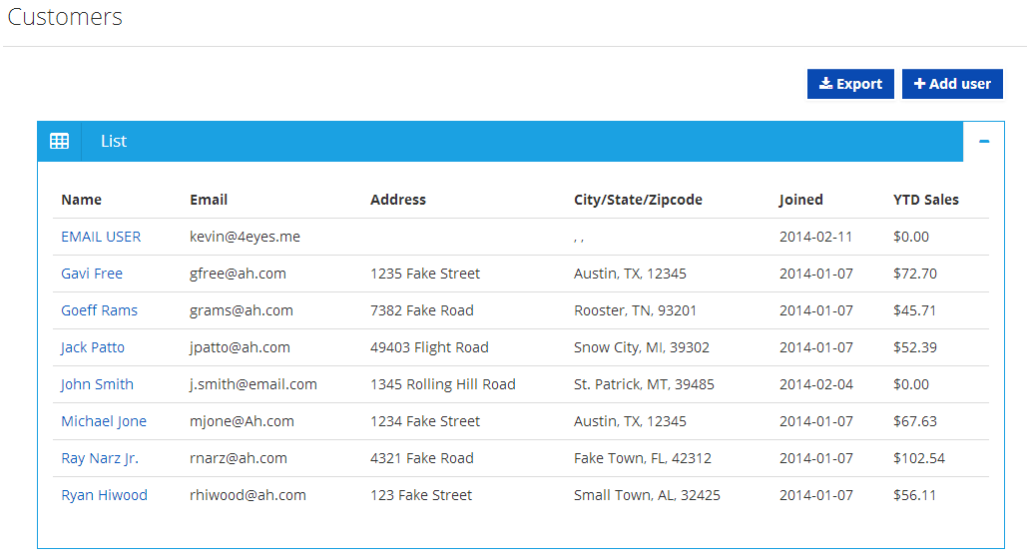


3. Edit the fields as needed. The notes and phone fields are optional.

4. Click **Save Settings**.

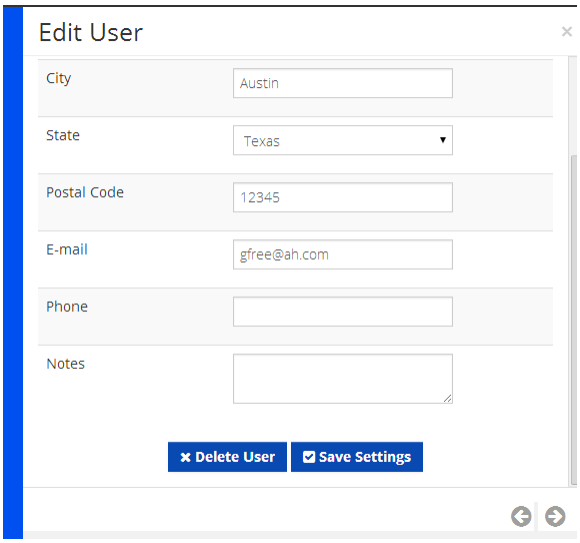
4.1.3 Deleting A Customer

1. Click **Customers** tab. A list of your current customers will appear.



Name	Email	Address	City/State/Zipcode	Joined	YTD Sales
EMAIL USER	kevin@4eyes.me		, ,	2014-02-11	$0.00
Gavi Free	gfree@ah.com	1235 Fake Street	Austin, TX, 12345	2014-01-07	$72.70
Goeff Rams	grams@ah.com	7382 Fake Road	Rooster, TN, 93201	2014-01-07	$45.71
Jack Patto	jpatto@ah.com	49403 Flight Road	Snow City, MI, 39302	2014-01-07	$52.39
John Smith	j.smith@email.com	1345 Rolling Hill Road	St. Patrick, MT, 39485	2014-02-04	$0.00
Michael Jone	mjone@Ah.com	1234 Fake Street	Austin, TX, 12345	2014-01-07	$67.63
Ray Narz Jr.	rnarz@ah.com	4321 Fake Road	Fake Town, FL, 42312	2014-01-07	$102.54
Ryan Hiwood	rhiwood@ah.com	123 Fake Street	Small Town, AL, 32425	2014-01-07	$56.11

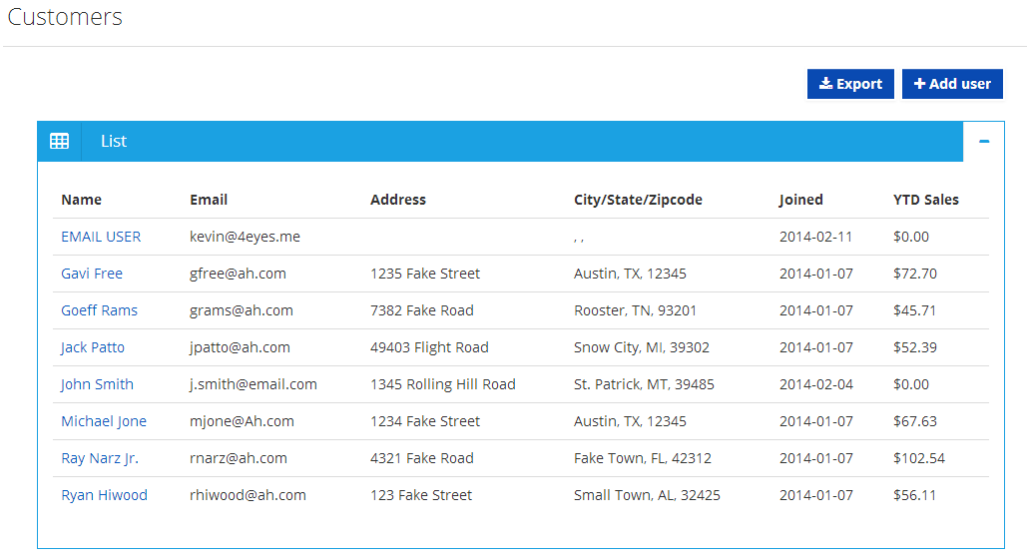
2. Click the **Name** of the customer you wish to delete. The Edit User menu will appear.



3. Scroll to the bottom of the menu. Click **Delete User**.

4.1.4 Exporting the Customer List

1. Click **Customers** tab. A list of your current customers will appear.



2. Click **Export**. You will be prompted to select where to save the export file.

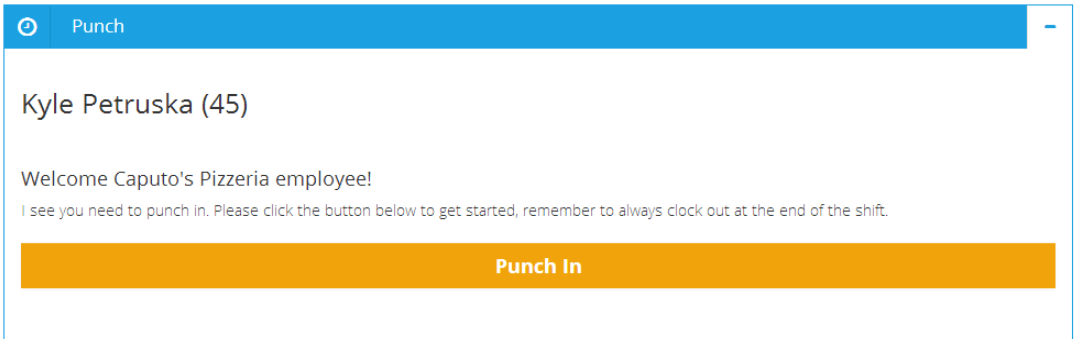
3. Once you have selected a spot to save the file, click **Save**.

5. Time Management

5.1.1 Clocking In

1. Click the **Clock** tab.

2. If not already clocked in, it should prompt you to clock in. Click **Punch In**.


Punch
Kyle Petruska (45)
Welcome Caputo's Pizzeria employee!
I see you need to punch in. Please click the button below to get started, remember to always clock out at the end of the shift.
Punch In

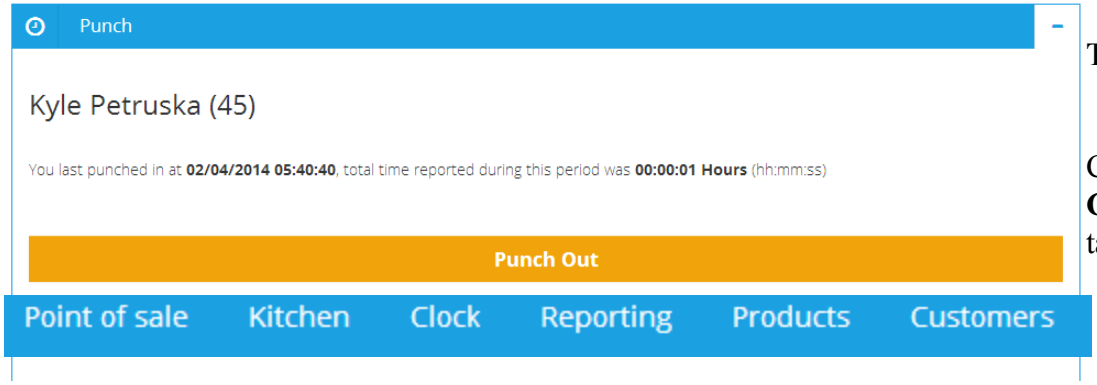
5.1.2 Clocking Out

1. Click the **Clock** tab.

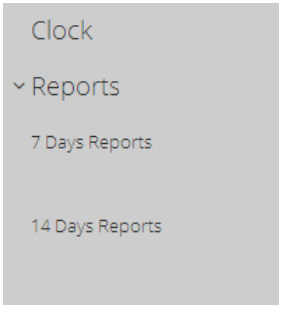
2. If not already clocked out, it should prompt you to clock out. Click **Punch Out**.

5.1.3 Time Reports

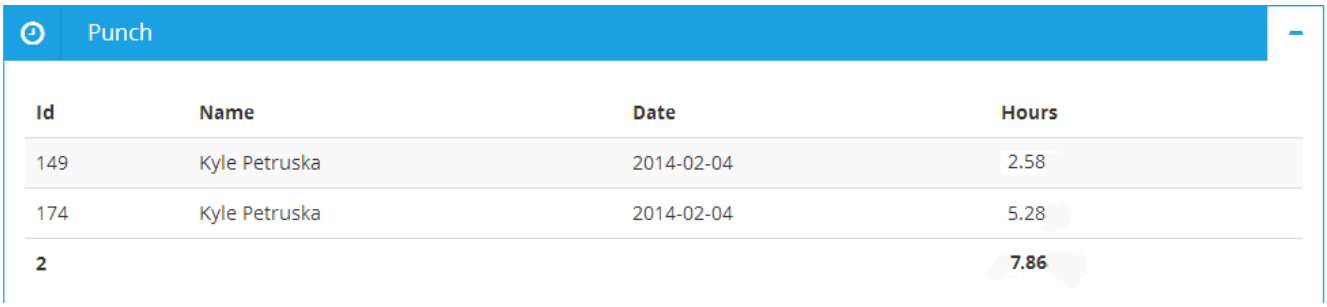
1. Click the **Clock** tab.



2. Click **Reports**. A drop down menu should appear.



3. Click either **7 Day Report** or **14 Day Report**. A report of every time you clocked in and how many hours you logged will appear.



Id	Name	Date	Hours
149	Kyle Petruska	2014-02-04	2.58
174	Kyle Petruska	2014-02-04	5.28
2			**7.86**

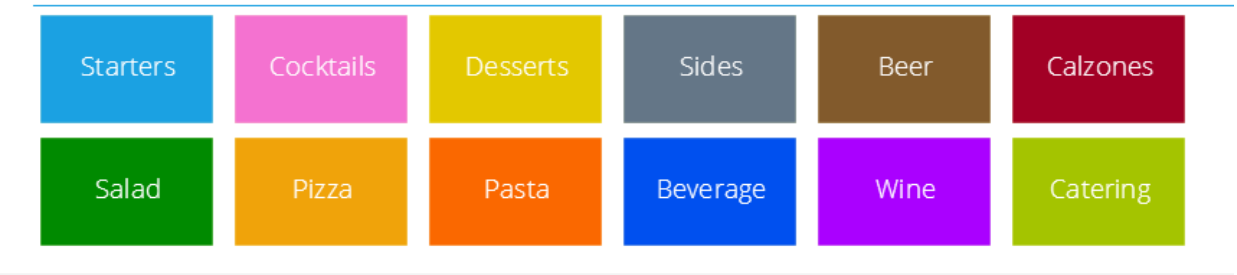
6. Order Pad

6.1 The Order Pad

The Order Pad is what your employees will use to build sales tickets and tender to process payment. The order pad automatically populates with the categories and products that you have placed into the system and are set as active.

6.1.1 Adding a Product to the Order Pad

1. Once at the order pad, click the **Category** of the product at the bottom right. If you can not find the category you are looking for, try scrolling through the pages. All the products of that category should appear in the box above.

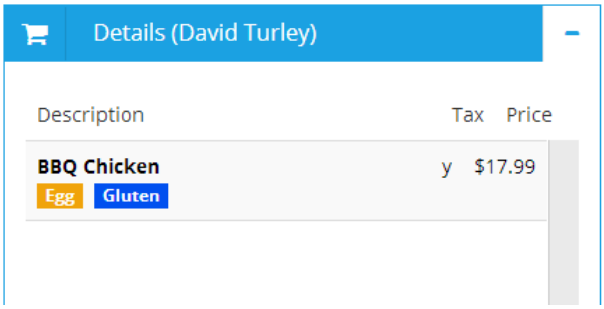


2. Click the **Product** you wish to add to the order pad. If you can not find product you are looking for, try scrolling through the pages.

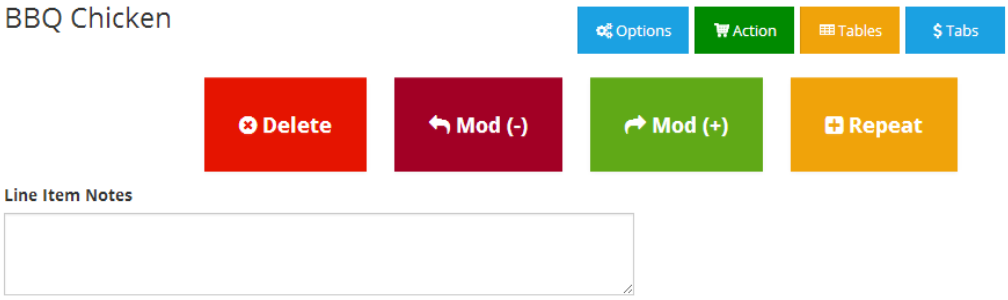
3. **Verify** that the product as been added to the order pad on the left side of the screen.

6.1.2 Deleting a Product from the Order Pad

1. Click the product you wish to delete in the Order Pad.

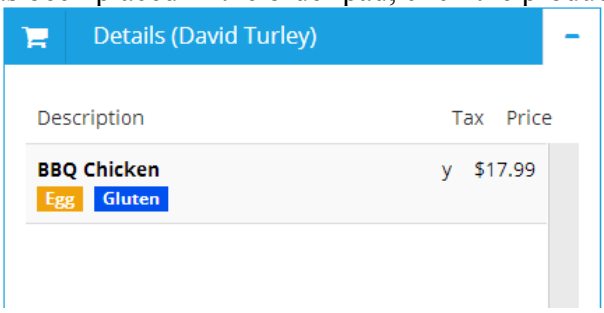


2. Click **Delete**. A confirmation should appear and the product removed from the Order Pad.

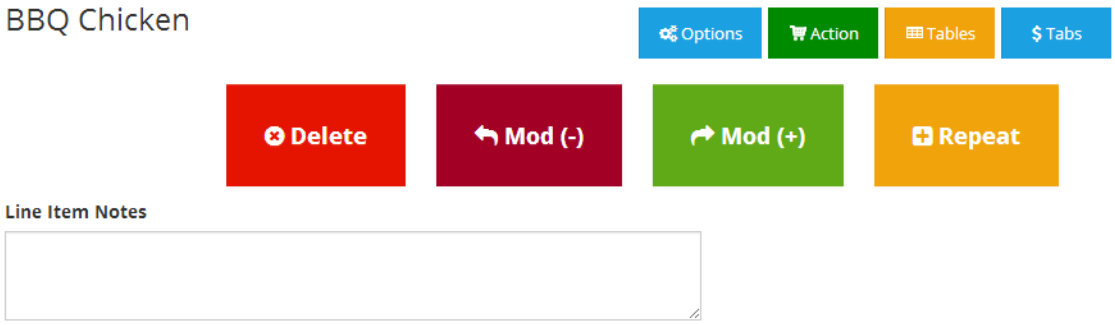


6.1.3 Adding Line Notes to a Product in the Order Pad

1. After the product as been placed in the order pad, click the product you wish to add line notes to.



2. In the **Line Item Notes** box type any notes you wish to add. These will be saved automatically.

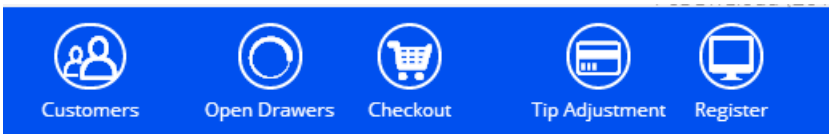


6.2 Options

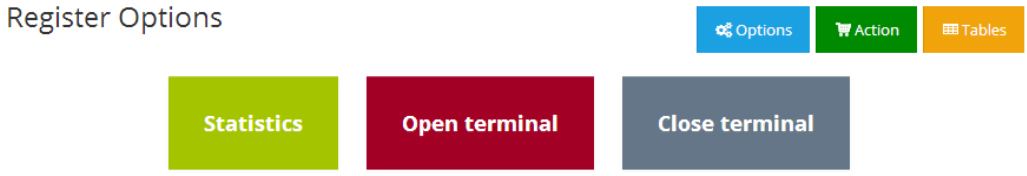
6.2.1 Opening a Terminal

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

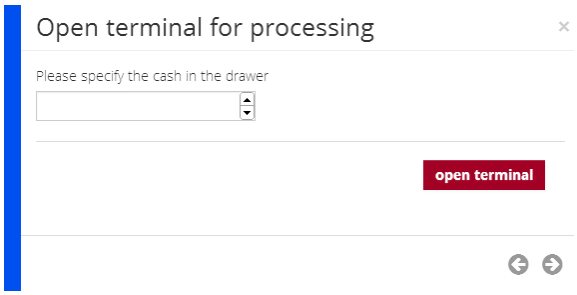
2. Click **Register**. Register Options will appear on the right side of the screen.



3. Click **Open terminal**. The Open terminal for processing menu will appear.



4. Enter the amount of cash that you have placed into the drawer of this register.

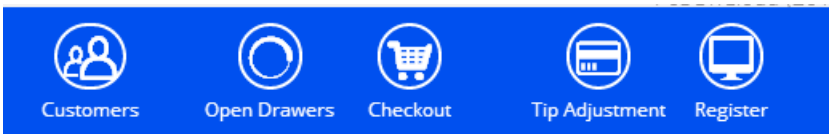


5. Click **open terminal**. The open terminal results should appear.

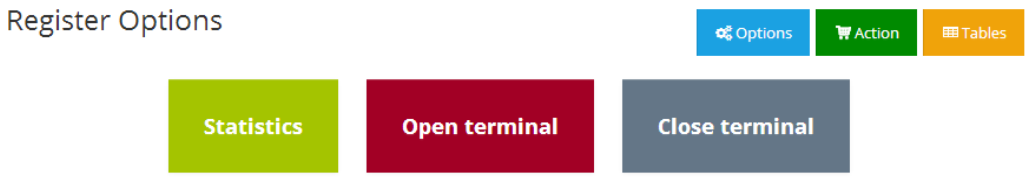
6.2.2 Closing a Terminal

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

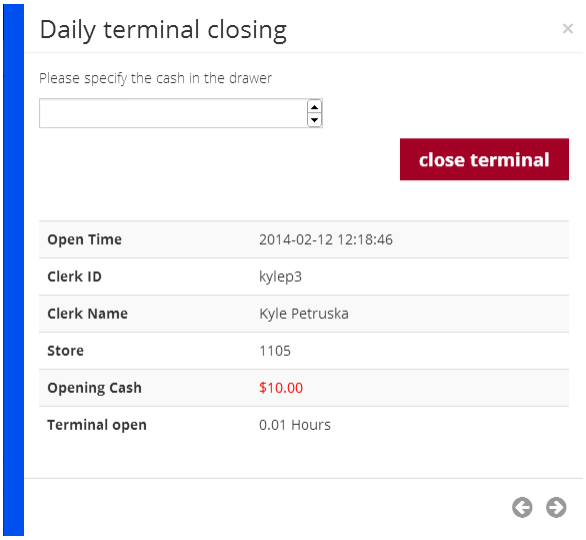
2. Click **Register**. Register Options will appear on the right side of the screen.



3. Click **Close terminal**. The Daily terminal closing menu will appear.



4. Enter the amount of cash you currently have in the drawer of this register.

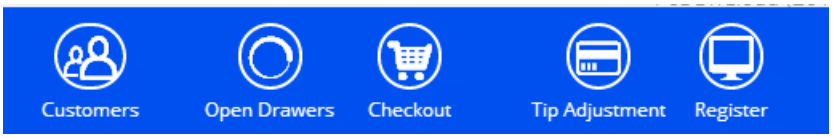


5. Click **close terminal**. The close terminal results should appear.

6.2.3 Tip Adjustment

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

2. Click **Tip Adjustment**. Tip Adjustment menu will appear.

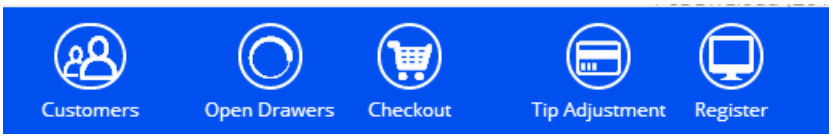


3. Add the tip amount to the box to the right of the order.

6.2.4 Manually Opening the Drawer.

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

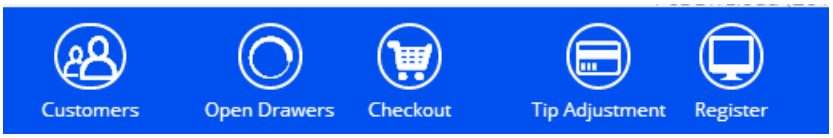
2. Click **Open Drawers**. The drawer will open.



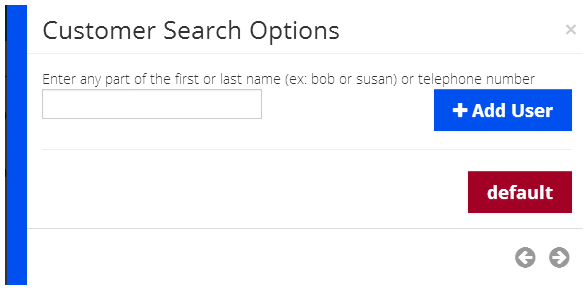
6.2.5 Adding a New Customer From the Order Pad

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

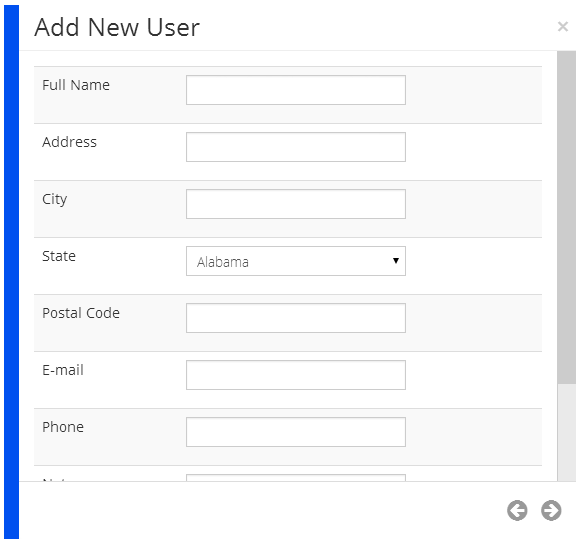
2. Click **Customers**. The Customer Search Options menu will appear.



3. Click **Add User**. The Add New User will appear.



4. Enter all the information into the correct field.

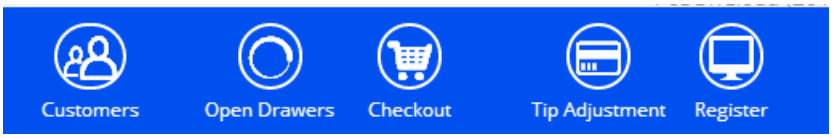


5. Click **Save Settings** when you are finished.

6.2.6 Selecting a Customer From the Order Pad

1. Click the blue **Options** button. A menu will appear at the bottom of the screen.

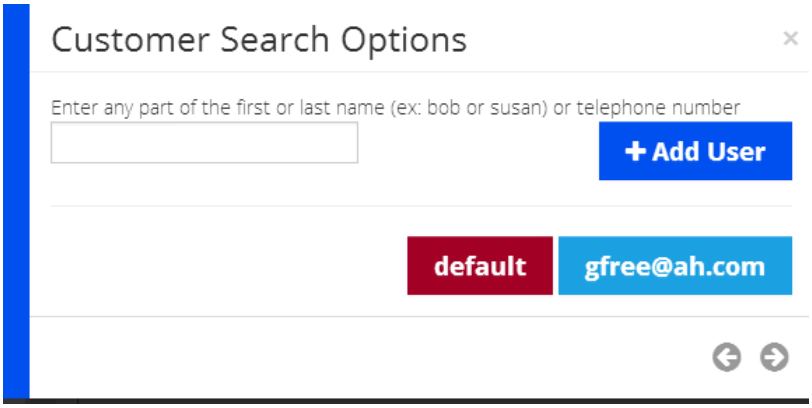
2. Click **Customers**. The Customer Search Options menu will appear.



3. Enter either the customer's name or phone number into the field. Partial names or number can also be searched.

4. Press **Enter**. A list of all matching customers will appear.

5. Select the correct customer. Their e-mail address should appear in a light blue box.


Customer Search Options
Enter any part of the first or last name (ex: bob or susan) or telephone number
+ Add User
default
gfree@ah.com

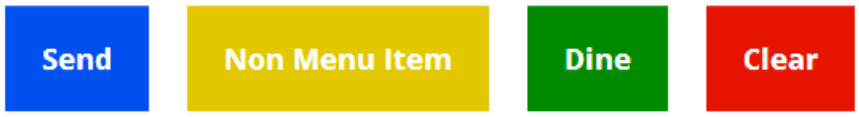
6. Click their **e-mail address**. The order is now set for that customer.

6.3 Actions

6.3.1 Sending an order to the kitchen

1. Once you have added all the products to the order pad, click the green **Actions** button.

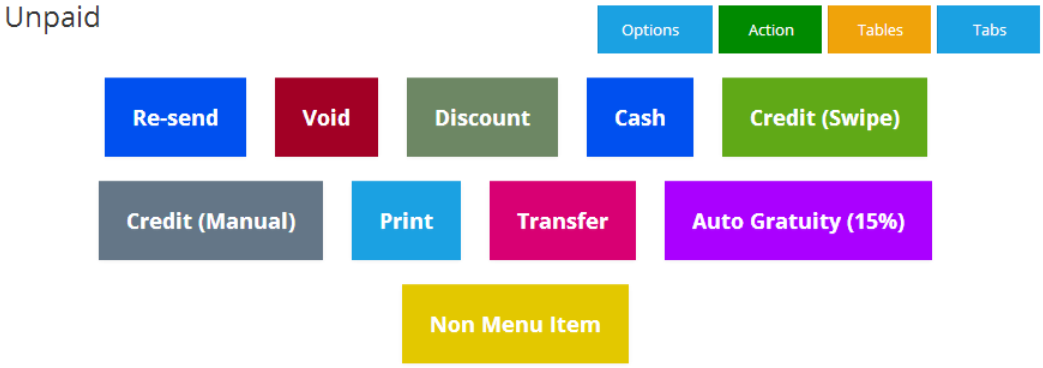
2. Click **Send**. Your order is now sent to the kitchen and the table menu will now appear.



6.3.2 Completing an Order

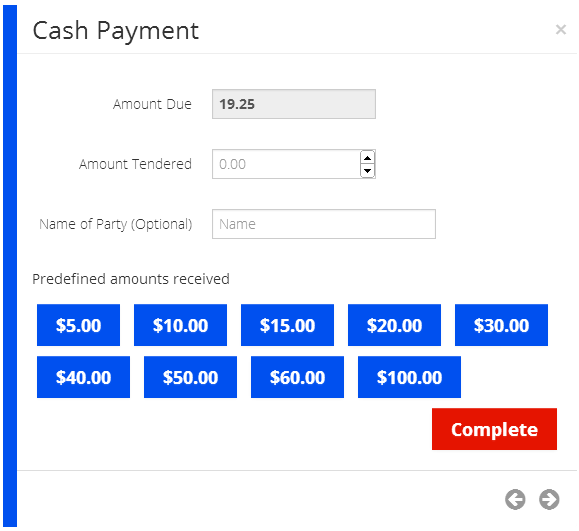
1. Once your order has been completed by the kitchen, click the green **Actions** button

2. Select the **type of payment.**



IF – CASH

3. The Cash Payment menu will appear. This will show the amount due, amount tendered, and the name of the party.



4. Either enter the amount tendered into the field manually or by using the predefined amount buttons.

5. Click **complete**. The order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

IF – CREDIT (SWIPE)

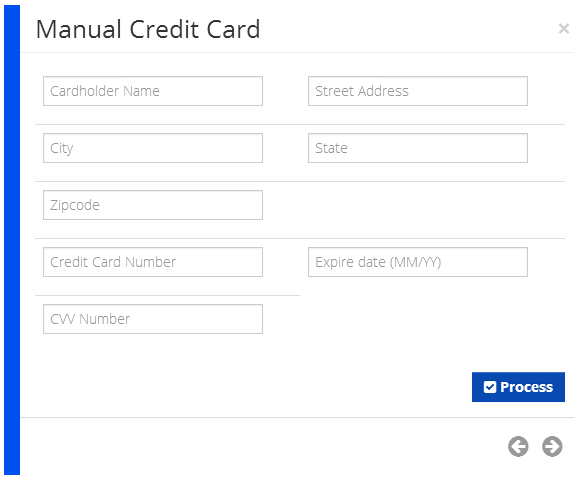
3. The Credit Card menu will appear.

4. Swipe the card. All the needed card information should automatically complete. If not, clear the field and swipe again.

5. Click **Authorize**. If accepted, the order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

IF – CREDIT (MANUAL)

3. The Manual Credit Card menu will appear.



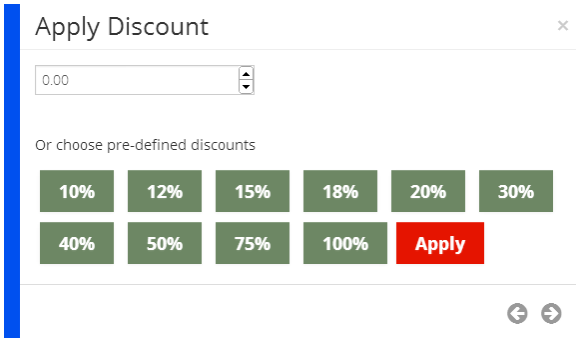
4. Enter all the needed information into the correct fields.

5. Click **Process**. If accepted, the order summary should appear detailing the order number, payment type, total for the order, amount tenders, and change due.

6.3.3 Applying a Discount

1. Once your order has been completed by the kitchen, click the green **Actions** button

2. Click **Discount**. The apply discount menu will appear.



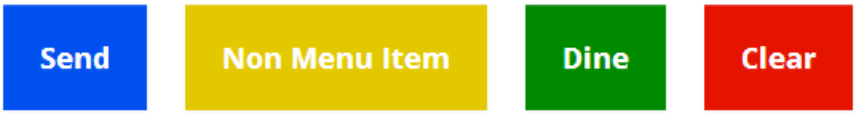
3. Either input the amount you want to discount or click one of the pre-defined discounts of 10%, 12%, 15%, 18%, 20%, 30%, 40%, 50%, 75%, and 100%.

4. Click **Apply**. The amount will be discounted from the order total.

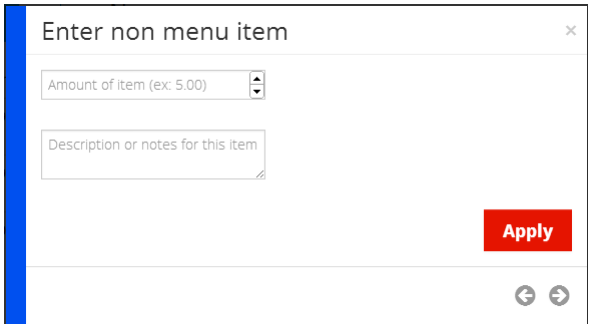
6.3.6 Non-Menu Item

1. Once at the order pad, click the green **Actions** button

2. Click **Non Menu Item**. The non menu item menu will appear.



3. The first field is the cost that the item will be.



4. The second field is the description of the item.

5. Click **Apply**. The item will be added to the order pad with the specified price and description. For this example we simply named it “Non Menu Item.”